

## HELPLINE AND EMAIL REFERENCE GUIDE

STORE OPERATIONS		
Accounts Payable	APCustomerCare@starbucks.com (888) 796-5282 ext. 20631-84307	Questions regarding invoices and payment status
Enterprise Help Desk (EHD)	(888) 796-5282 ext. 1	All POS/MWS computer system related issues, IT hardware, software, network, telephone
Entertainment Support Desk (ESD)	(888) 796-5282 ext. 1	For 32" LCD screen, Black Box, "Now Playing" equipment stores
Facility Contact Center (FCC)	(877) 728-9349	Brewing, grinding, Alarm System, Safe, Drive Thru headsets, and building facility issues (i.e. roof leaks, parking lot, landscaping)
Inventory	retinv@starbucks.net (888) 796-5282 ext. 20631-88441	Questions regarding cycle counts, coffee counts, full inventories and P&L inventory adjustments
Licenses and Permits	(888) 796-5282 ext. 20631-88705	Questions regarding licenses or permits
Play Network Customer Service	(888) 567-PLAY	Order CDs if necessary for overhead play
Promo/Operations Hotline	(888) 796-5282 ext. 50000-51184 option 3	Requests for promotional materials (Workbook, Siren's Eye, training materials, job aids), Daily Records Books and Duty Roster Notebooks. Questions regarding Siren's Eye, operational issues, products, beverages, or Hear Music.
Purolator Shipping Labels	(800) 326-4963 ext. 4240 (CN)	Order preprinted shipping labels for mailpack to the SSC (CN)
Retail Accounting	RetAcct@starbucks.net	Questions regarding P&L
Sales Audit	SalesAudit@starbucks.net	Questions regarding banking issues and overs/shorts
Sales Reporting Hotline	(888) 796-5282 Ext. 20631-87400	For questions from a landlord or mall office representative requesting store sales information
Signage	Preferred: signage@starbucks.com Back up: (888) 796-5282 ext. 20631-84782	Requests for promotional signage, Drive thru and interior menu inserts, pastry signage, non-SKU'd core signage and POS transaction policy stickers
Starbucks North America Voicemail (SNA VM)	(888) 729-5656	Field and support partner access
EMERGENCIES AND SECURITY		
Emergency Communications	(800) 923-BEAN [2326] ext. 2	Message board used for unexpected emergencies and information
Global Security Operations Center - GSOC	(888) 796-5282 ext. 85400	Report non-emergency and emergency security incidents
Risk Management/Quality Assurance	(888) 796-5282 ext. 3	Report damage to store property, work-related injuries, and customer incidents
Product Quality Hotline	(888) 796-5282 ext. 3, option 3	Report specific product quality issues
PAYROLL AND PARTNER RESOURCES		
Canadian Benefits Centre	(866) 821-7913	To enroll or review your Benefit selections and RRSP contribution
Employee Assistance Program	(800) 327-5564 (U.S.) (800) 268-5211 (CN)	For assistance with personal issues and services to help balance work and life
Partner Contact Center (PCC)	(866) 504-7368	Questions regarding pay- related issues, reporting partner injuries, benefit inquiries and direct deposit assistance Canada only - contact for personal information and direct deposit changes
US Benefits Center	(877) SBUX-BEN [7289-236]	To enroll, review elections, and make changes to Benefits
Partner Self Service/My Partner Info	Store Portal	View/update personal information including direct deposit, sick/vacation time, address, emergency contact, W-4
CORPORATE COMPLIANCE		
Business Conduct Helpline	(800) 611-7792 (866) 614-0760 – French-speaking partners	One of several ways that partners may ask questions or report concerns regarding Business Code of Conduct

*The following is the only information that may be provided to customers.*

CUSTOMER SERVICE		
Customer Relations	(800) 23-LATTE [52883]	Store locations, donation requests, customer comments and questions, and equipment returns
Investor Relations	(888) 796-5282 20631-87118	Starbucks stock information.
Media Relations	(206) 318-7100	Starbucks media inquiries
Starbucks Internet website	Starbucks.com	Company information, Starbucks Card, nutritional information, job postings, etc.
Warranty Services	(800) 334-5553	Home brewing equipment troubleshooting and repair
Starbucks Card	(800) 782-7282	Questions regarding Starbucks Card

## DAILY RECORDS BOOK

### Use of the Daily Records Book (DRB)

This monthly book is used to record daily store information and is divided into weekly tabs for quick reference.

### Retention and Destruction

For security and legal compliance, the Daily Records Book must remain in store for six months and then be returned for long-term storage and destruction. Every six months you will receive communication requiring all DRBs older than six months to be boxed up and returned using an online return or pre-addressed mailing label. This ensures retention of legally required payroll documents that are included in the DRB.

### Calendar

The Daily Records Book contains the Fiscal Year Calendar to use for planning and recording store events.

### Checklists and Logs

- **Paid Out Log** is a monthly log located behind the Paid Out tab and is designed to ensure all paid outs are recorded and approved. This log should be reconciled weekly by the store manager.
- **Emergency Wage Advance Log** is a monthly log designed to record all emergency wage paid outs.
- **Store Repair and Maintenance Tracking Log** is a monthly log located in the front of the DRB and is designed to track calls made to the Enterprise Help Desk, Facility and Service Desk and the Facility Contact Center.
- **Punch Communication Log, Borrowed Partner Log, and Paid Time Off Log** are located at the end of the book under the Time and Attendance tab. Use these logs to record key time and attendance information using the policies and procedures on the Time and Attendance tab.

### Weekly Tabs

The following information is included in each Weekly Tab section:

- **Store Partner Pages:** a flexible tool to capture store information in one easy-to-reference place.
  - **Store Communication** ~ communicate voicemail, email and barista need-to-know information for all store partners.
  - **Partner Till Drop Log** ~ all partners with assigned tills must complete this section using the policies and procedures behind each Weekly tab.
  - **Safe Count, Change Bank Reconciliation, Deposit, and Partner Till Audit** ~ for details refer to the policies and procedures behind each Weekly tab.
  - **Partner Tip Drop Log** ~ use this log to track all tip bags dropped into the safe on a daily basis.
  - **Partner Tip Drop Removal** ~ use this space to track tip bags being removed from the store safe on a weekly basis.

### Miscellaneous

- **Sales Audit Envelope** ~ for credit card slips, refunds, voids and gift certificates.
- **P-Card/Paid Out Envelope** ~ for all P-Card, Paid In and Paid Out receipts.

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The materials in this book should not be reproduced and should not be used by anyone  
other than an authorized Starbucks partner.  
Keep book secured when not in use.**



## FISCAL YEAR 2010

Week 1  
Aug 23 - 29

OCTOBER, PERIOD 1—FY '10 09/28/09–10/25/09							
	Mon	Tue	Wed	Thu	Fri	Sat	Sun
week 1	28	29	30	1	2	3	4
week 2	5	6	7	8	9	10	11
week 3	12	13	14	15	16	17	18
week 4	19	20	21	22	23	24	25

APRIL, PERIOD 7—FY '10 3/29/10–4/25/10							
	Mon	Tue	Wed	Thu	Fri	Sat	Sun
week 27	29	30	31	1	2	3	4
week 28	5	6	7	8	9	10	11
week 29	12	13	14	15	16	17	18
week 30	19	20	21	22	23	24	25

NOVEMBER, PERIOD 2—FY '10 10/26/09–11/22/09							
	Mon	Tue	Wed	Thu	Fri	Sat	Sun
week 5	26	27	28	29	30	31	1
week 6	2	3	4	5	6	7	8
week 7	9	10	11	12	13	14	15
week 8	16	17	18	19	20	21	22

MAY, PERIOD 8—FY '10 4/26/10–5/23/10							
	Mon	Tue	Wed	Thu	Fri	Sat	Sun
week 31	26	27	28	29	30	1	2
week 32	3	4	5	6	7	8	9
week 33	10	11	12	13	14	15	16
week 34	17	18	19	20	21	22	23

DECEMBER, PERIOD 3—FY '10 11/23/09–12/27/09							
	Mon	Tue	Wed	Thu	Fri	Sat	Sun
week 9	23	24	25	26	27	28	29
week 10	30	1	2	3	4	5	6
week 11	7	8	9	10	11	12	13
week 12	14	15	16	17	18	19	20
week 13	21	22	23	24	25	26	27

JUNE, PERIOD 9—FY '10 5/24/10–6/27/10							
	Mon	Tue	Wed	Thu	Fri	Sat	Sun
week 35	24	25	26	27	28	29	30
week 36	31	1	2	3	4	5	6
week 37	7	8	9	10	11	12	13
week 38	14	15	16	17	18	19	20
week 39	21	22	23	24	25	26	27

JANUARY, PERIOD 4—FY '10 12/28/09–1/24/10							
	Mon	Tue	Wed	Thu	Fri	Sat	Sun
week 14	28	29	30	31	1	2	3
week 15	4	5	6	7	8	9	10
week 16	11	12	13	14	15	16	17
week 17	18	19	20	21	22	23	24

JULY, PERIOD 10—FY '10 6/28/10–7/25/10							
	Mon	Tue	Wed	Thu	Fri	Sat	Sun
week 40	28	29	30	1	2	3	4
week 41	5	6	7	8	9	10	11
week 42	12	13	14	15	16	17	18
week 43	19	20	21	22	23	24	25

FEBRUARY, PERIOD 5—FY '10 1/25/10–2/21/10							
	Mon	Tue	Wed	Thu	Fri	Sat	Sun
week 18	25	26	27	28	29	30	31
week 19	1	2	3	4	5	6	7
week 20	8	9	10	11	12	13	14
week 21	15	16	17	18	19	20	21

AUGUST, PERIOD 11—FY '10 7/26/10–8/22/10							
	Mon	Tue	Wed	Thu	Fri	Sat	Sun
week 44	26	27	28	29	30	31	1
week 45	2	3	4	5	6	7	8
week 46	9	10	11	12	13	14	15
week 47	16	17	18	19	20	21	22

MARCH, PERIOD 6—FY '10 2/22/10–3/28/10							
	Mon	Tue	Wed	Thu	Fri	Sat	Sun
week 22	22	23	24	25	26	27	28
week 23	1	2	3	4	5	6	7
week 24	8	9	10	11	12	13	14
week 25	15	16	17	18	19	20	21
week 26	22	23	24	25	26	27	28

SEPTEMBER, PERIOD 12—FY '10 8/23/10–10/3/10							
	Mon	Tue	Wed	Thu	Fri	Sat	Sun
week 48	23	24	25	26	27	28	29
week 49	30	31	1	2	3	4	5
week 50	6	7	8	9	10	11	12
week 51	13	14	15	16	17	18	19
week 52	20	21	22	23	24	25	26
week 53	27	28	29	30	1	2	3

**Cash Management Log Policies, Standards & Procedures**

The Cash Management Log must be completed each day. Print legibly and complete in pen.  
Store operating funds and tip funds must be secured at all times.

**Till Drop Procedure (Cash Controller):**

1. Record register partner's name, Register ID (#, Top/Bottom), date and CC initials on till drop bag.
2. Place funds from drop box, sales media from POS drawer and Closing Register Receipt in till drop bag. Seal till drop bag.
3. Record register partner name, entire till drop bag #, CC initials and time on the matching Register ID section of the Till Drop Log.
4. Secure till drop bag in inner compartment of safe, behind door 2.

**Final Use Till Count Procedure (Cash Controller):**

1. Remove till, sales media from POS drawer, funds from drop box and Closing Register Receipt.
2. Count down combined funds from till and drop box using cash scale in cash calculator mode.
3. Remove funds in excess of opening fund amount, leaving opening fund amount in till.
4. Follow Till Drop Procedure to secure excess funds, sales media and closing register receipt.
5. Secure till with verified opening fund in POS drawer or safe.

**Safe Count Procedure (Cash Controller):**

The safe must not be left open and unattended.

The safe must not be opened or the time delay set during the first 30 minutes and the last 30 minutes of customer operations.

Only the Cash Controller may set and access the safe.

Complete and record an accurate physical "start" count when accepting the cash controller keys and an "end" count when passing the cash controller keys to the next cash controller or counting out at the end of day.

1. Record CC initials and start or end count time on the Safe Count Log.
2. Count and record change fund amount, opening till fund amounts, # of till drops, # of Customer Recovery certificates, PCard, and # of tip drops.

NOTE: Lock Out Period Safes: When completing a safe count during the Lockout Period (3pm-8am) record "N/A" or "Locked Out" in the number of till and tip drop section of the safe count. All safe counts occurring outside of the lockout period (8am-3pm) must include an actual physical count of all till and tip drop bags.

**Deposit Log (Cash Controller):**

NOTE: Procedures for preparing the deposit and transporting the deposit to the bank are located in the Store Operations manual section 4 Cash Control.

The deposit must be prepared and transported to the bank every day.

The deposit must be prepared after 8am and must be transported to the bank by 3pm.

The deposit must be taken inside the bank for processing if the bank is open. The weekend depository box must only be used if the bank is closed.

**Deposit Prep Section Procedure:**

1. Record the start time and CC initials in the Deposit Prep section on the date the deposit is processed.
2. Record deposit \$, deposit bag # and completion time.
3. **Deposit Witness** records their initials after confirming that the CC initials, completion time, deposit slip amount and sealed deposit bag # are accurately recorded in the Deposit Prep section.
4. Secure sealed deposit bag in inner compartment of safe, behind door 2, if not immediately transported to bank.

**Deposit to Bank Section Procedure:**

1. Record CC name taking deposit to bank, date to bank, time to bank and deposit bag # in the Deposit to Bank section on the date the deposit is processed.
2. **Banking Witness** records their initials after confirming that the CC initials, date and time of the CC departure to bank and sealed bag # are accurate and recorded in the Deposit to Bank section.
3. Record validated deposit amount and validated time on Deposit to Bank section and attach validated deposit slip after returning from the bank or when the deposit slip has been retrieved for deposits made through the weekend depository.

**Till Audit Procedure (Store Manager):**

A minimum of two random till audits must be performed each week.

1. Follow steps 1-4 of Final Use Till Count.
2. Record SM name, date, register partner's name and Register ID on Partner Till Audit Log. Over/short will be recorded when deposit is prepared.
3. Secure till with verified opening fund in POS drawer or safe.
4. Ensure over/short is recorded after deposit is prepared on following day.

**Report Store Operating Funds Procedure (Store Manager):**

The Store Operating Funds (change bank and till bank) must be physically verified and updated on the MWS each week.

1. From the MWS select "Manager Menu", "Daily Bookkeeping Menu", "Report Store Operating Funds"
2. F1 - to Count Change/Till Bank Funds. Enter the amount of money actually in the Change and Till Bank in the two fields "Total Change Bank" and "Total Assigned/Unassigned Tills". Record the total on the Cash Management Log under "Report Store Operating Funds" and sign off.
3. Upon completion of entering the funds amounts press "F1" to Save and then "F7" to Quit.

**Tip Drop Procedure (all partners):**

Tip funds must be secured at all times.

1. Remove tip funds from plexi, place funds in a tip drop bag and seal tip drop bag.
2. Record date on tip drop bag.
3. Record partner #, initials, and entire tip drop bag # on the Tip Drop Log.
4. Secure tip drop bag in inner compartment of safe, behind door 2.
5. Witness records their initials and time after verifying the tips have been secured in the safe.

**Tip Drop Removal Procedure**

1. Remove tip drop bags from inner compartment of safe (cash controller).
2. Record entire tip drop bag # for each tip drop bag on Partner Tip Removal Log.
3. Record CC initials as Witness and time.
4. Transfer tip drop bags to partner processing tips.
5. Partner receiving tip drop bags records partner # and initials after verifying tip drop bag #'s.

**Accountability and Duty to Report**

Failure to comply with cash management log policy endangers partner safety. Acts in violation or omissions of policy are grounds for disciplinary action up to and including termination. Uncorrected or continuing violations must be reported to management, your local Partner Resources generalist or the Standards of Business Conduct Helpline at 800/611-7792.



[Faint, illegible text or markings, possibly a signature or stamp, located in the upper left portion of the lined area.]

## Cash Management Log

## STORE COMMUNICATIONS

DAY - Monday

DATE - 8/23/10

REGISTER 1 TOP		TILL DROP LOG	
PARTNER NAME	DROP BAG #	CC INITIALS	TIME
Nigel	99323548	WS	11:53
Tyler	BF99323542	(2)	7:20

REGISTER 1 BOTTOM		TILL DROP LOG	
PARTNER NAME	DROP BAG #	CC INITIALS	TIME
Angie	BF99323654	(90)	1:19P

REGISTER 2 TOP		TILL DROP LOG	
PARTNER NAME	DROP BAG #	CC INITIALS	TIME
Jim	BF99323524	(2)	4:15P

REGISTER 2 BOTTOM		TILL DROP LOG	
PARTNER NAME	DROP BAG #	CC INITIALS	TIME
Simon	BF99323514	(2)	8:42P

REGISTER 3 TOP		TILL DROP LOG	
PARTNER NAME	DROP BAG #	CC INITIALS	TIME

REGISTER 3 BOTTOM		TILL DROP LOG	
PARTNER NAME	DROP BAG #	CC INITIALS	TIME

REGISTER 4 TOP		TILL DROP LOG	
PARTNER NAME	DROP BAG #	CC INITIALS	TIME

REGISTER 4 BOTTOM		TILL DROP LOG	
PARTNER NAME	DROP BAG #	CC INITIALS	TIME

# **Cash Management Log** DAY- Monday DATE- 8/23/10 0

SAFE COUNT										
NAME	OPEN: <u>Nigel</u>		MID 1:		MID 2:		MID 3:		CLOSE: <u>Nigel</u>	
SAFE COUNT	START	END	START	END	START	END	START	END	START	END
TIME	5:09	12:00							12:39P	8:57P
\$0.01	28	24							44	36
\$0.05	76	25							25	23
\$0.10	17	14							26	21
\$0.25	18	16							36	29
\$1.00	244	248							248	236
\$2.00	0	0							0	0
\$5.00	71	38							238	223
\$10.00	3	3							0	5
\$20.00	52	62							0	7
OTHER \$'s	0	0							0	0
Total Change Fund	2000	2000							2000	2000
# Tills/Total \$	4/200	Active							Active	4/200
# Till Drops	0	0							40	40
Cust. Recov. Cert.	31	31							31	31
P-Card	Y/N	Y/N	Y/N	Y/N	Y/N	Y/N	Y/N	Y/N	Y/N	Y/N
# Tip Bags	0	0							40	40
Comments:									(10)	(10)

Report Store Operating Funds	
Signature: <u>[Signature]</u>	\$ Amount Entered: <u>3000</u>

*Attach validated deposit slip/courier slip and deposit bag receipt to this sheet*

DEPOSIT INFORMATION	
Cash Controller: <u>[Signature]</u>	Taken By Cash Controller: <u>Nigel</u>
Preparing Deposit: <u>[Signature]</u>	Date to Bank: <u>8/23</u>
Start Time: <u>9:10</u>	Time to Bank: <u>12:20</u>
Deposit Bag #: <u>128416922</u>	Deposit Bag #: <u>128416922</u>
Deposit \$: <u>1923.50</u>	Bank Validated \$: <u>1923.50</u>
Completion Time: <u>9:40</u>	Bank Validation Time: <u>12:20</u>
Change Order \$: <u>1.66</u>	Change \$ Received:
Comments:	Comments:

\*Deposit Witness confirms that cc initials, completion time, deposit slip amount and sealed deposit bag # are accurately recorded in Deposit Prep section.

\*\*Banking Witness confirms that the cc initials, date and time of cc departure to bank and sealed bag # are accurate and recorded in the Deposit to Bank section.

PARTNER TILL AUDIT #1	
Store Manager:	
Date:	
Partner Name:	
Register ID	
Over/Short \$:	
Comments:	

PARTNER TILL AUDIT #2	
Store Manager:	
Date:	
Partner Name:	
Register ID	
Over/Short \$:	
Comments:	

PARTNER TILL AUDIT #3	
Store Manager:	
Date:	
Partner Name:	
Register ID	
Over/Short \$:	
Comments:	

PARTNER TIP DROP LOG				
PARTNER #	INITIALS	DROP BAG #	WITNESS (mandatory)	TIME

DM VERIFICATION	
DM Signature:	Date Reviewed:
Comments:	

PARTNER TIP REMOVAL (weekly)			
PARTNER #		INITIALS:	
CC WITNESS (mandatory):		TIME:	
DROP BAG #S:			

\*Witness on tip drop removals must be the scheduled cash controller.

## Cash Management Log

## STORE COMMUNICATIONS

DAY -

DATE -

## REGISTER 1 TOP

TILL DROP LOG

PARTNER NAME	DROP BAG #	CC INITIALS	TIME
Michael Smith	99323500 49323504	MS K	1:30

## REGISTER 1 BOTTOM

TILL DROP LOG

PARTNER NAME	DROP BAG #	CC INITIALS	TIME
Helen	99323512	H	2:01

## REGISTER 2 TOP

TILL DROP LOG

PARTNER NAME	DROP BAG #	CC INITIALS	TIME
Valentina	99323510	V	2:21

## REGISTER 2 BOTTOM

TILL DROP LOG

PARTNER NAME	DROP BAG #	CC INITIALS	TIME
Robert	99323530	R	

## REGISTER 3 TOP

TILL DROP LOG

PARTNER NAME	DROP BAG #	CC INITIALS	TIME

## REGISTER 3 BOTTOM

TILL DROP LOG

PARTNER NAME	DROP BAG #	CC INITIALS	TIME

## REGISTER 4 TOP

TILL DROP LOG

PARTNER NAME	DROP BAG #	CC INITIALS	TIME

## REGISTER 4 BOTTOM

TILL DROP LOG

PARTNER NAME	DROP BAG #	CC INITIALS	TIME

## Cash Management Log

DAY- Tues DATE - 5/24/10

## SAFE COUNT

NAME	OPEN: 7/19/14		MID 1:		MID 2:		MID 3:		CLOSE: 8/20/14	
SAFE COUNT	START	END	START	END	START	END	START	END	START	END
TIME	5	1:30							1:30	9:00
\$0.01	34	34							34	31
\$0.05	23	21							21	12
\$0.10	21	18							18	14
\$0.25	29	27	<del>29</del>						29	20
\$1.00	236	236							236	207
\$2.00	0	0							0	0
\$5.00	223	181							181	132
\$10.00	5	5							5	7
\$20.00	2	21							21	26
OTHER \$'s	0	0							0	0
Total Change Fund	2800	2200							2090	2090
# Tills/Total \$	4/1200	4/1200							4/1200	4/1200
# Till Drops	2	2							2	2
Cust. Recov. Cert.	31	31							31	32
P-Card	Y/N	Y/N	Y/N	Y/N	Y/N	Y/N	Y/N	Y/N	Y/N	Y/N
# Tip Bags	2	2							2	2
Comments:										

## Report Store Operating Funds

Signature:	\$ Amount Entered:
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Attach validated deposit slip/courier slip and deposit bag receipt to this sheet

## DEPOSIT INFORMATION

Cash Controller:	Taken By Cash Controller:
Preparing Deposit:	Date to Bank:
Start Time:	Time to Bank:
Deposit Bag #:	Deposit Bag #:
Deposit \$:	Bank Validated \$:
Completion Time:	Bank Validation Time:
Change Order \$:	Change \$ Received:
Comments:	Comments:

\*Deposit Witness confirms that cc initials, completion time, deposit slip amount and sealed deposit bag # are accurately recorded in Deposit Prep section.

\*\*Banking Witness confirms that the cc initials, date and time of cc departure to bank and sealed bag # are accurate and recorded in the Deposit to Bank section.

## PARTNER TILL AUDIT #1

Store Manager:	Date:
Partner Name:	Register ID:
Over/Short \$:	Comments:

## PARTNER TILL AUDIT #2

Store Manager:	Date:
Partner Name:	Register ID:
Over/Short \$:	Comments:

## PARTNER TILL AUDIT #3

Store Manager:	Date:
Partner Name:	Register ID:
Over/Short \$:	Comments:

## PARTNER TIP DROP LOG

PARTNER #	INITIALS	DROP BAG #	WITNESS (mandatory)	TIME

## DM VERIFICATION

DM Signature:	Date Reviewed:
Comments:	

## PARTNER TIP REMOVAL (weekly)

PARTNER #:	INITIALS:
CC WITNESS (mandatory):	TIME:
DROP BAG #S:	

\*Witness on tip drop removals must be the scheduled cash controller.

## Cash Management Log

## STORE COMMUNICATIONS

DAY - Wednesday DATE - 8/25/10

## REGISTER 1 TOP

TILL DROP LOG

PARTNER NAME	DROP BAG #	CC INITIALS	TIME
<u>Nigel X-tra</u>	<u>99323556</u>	<u>W</u>	<u>12:30p</u>
	<u>RF 99323588</u>	<u>(7)</u>	<u>3:20p</u>

## REGISTER 1 BOTTOM

TILL DROP LOG

PARTNER NAME	DROP BAG #	CC INITIALS	TIME
<u>Beck</u>	<u>BF 99321173</u>	<u>(2)</u>	<u>8:56p</u>

## REGISTER 2 TOP

TILL DROP LOG

PARTNER NAME	DROP BAG #	CC INITIALS	TIME
<u>Argie</u>	<u>BF 99323562</u>	<u>(2)</u>	<u>3:41p</u>

## REGISTER 2 BOTTOM

TILL DROP LOG

PARTNER NAME	DROP BAG #	CC INITIALS	TIME
<u>Valentine</u>	<u>BF 99323564</u>	<u>(2)</u>	<u>9:00p</u>

## REGISTER 3 TOP

TILL DROP LOG

PARTNER NAME	DROP BAG #	CC INITIALS	TIME

## REGISTER 3 BOTTOM

TILL DROP LOG

PARTNER NAME	DROP BAG #	CC INITIALS	TIME

## REGISTER 4 TOP

TILL DROP LOG

PARTNER NAME	DROP BAG #	CC INITIALS	TIME

## REGISTER 4 BOTTOM

TILL DROP LOG

PARTNER NAME	DROP BAG #	CC INITIALS	TIME

# Cash Management Log

DAY Wednesday DATE - 8/25/10

SAFE COUNT										
NAME	OPEN: <u>11:15</u>		MID 1:		MID 2:		MID 3:		CLOSE: <u>11:16</u>	
	START	END	START	END	START	END	START	END	START	END
TIME	<u>5</u>	<u>12:28</u>							<u>2:54</u>	<u>9:28P</u>
\$0.01	<u>32</u>	<u>32</u>							<u>30</u>	<u>20</u>
\$0.05	<u>10</u>	<u>10</u>							<u>19</u>	<u>14</u>
\$0.10	<u>14</u>	<u>14</u>							<u>13</u>	<u>6</u>
\$0.25	<u>20</u>	<u>20</u>							<u>19</u>	<u>13</u>
\$1.00	<u>219</u>	<u>219</u>							<u>219</u>	<u>219</u>
\$2.00	<u>0</u>	<u>0</u>							<u>0</u>	<u>0</u>
\$5.00	<u>137</u>	<u>137</u>							<u>245</u>	<u>201</u>
\$10.00	<u>7</u>	<u>7</u>							<u>7</u>	<u>11</u>
\$20.00	<u>36</u>	<u>36</u>							<u>9</u>	<u>22</u>
OTHER \$'s	<u>2002</u>	<u>0</u>							<u>0</u>	<u>0</u>
Total Change Fund	<u>2002</u>	<u>2002</u>							<u>2002</u>	<u>2002</u>
# Tills/Total \$	<u>21160</u>	<u>Active</u>							<u>Active</u>	<u>4/200</u>
# Till Drops	<u>12</u>	<u>12</u>							<u>40</u>	<u>40</u>
Cust. Recov. Cert.	<u>32</u>	<u>32</u>							<u>31</u>	<u>31</u>
P-Card	<u>Y/N</u>	<u>Y/N</u>	<u>Y/N</u>	<u>Y/N</u>	<u>Y/N</u>	<u>Y/N</u>	<u>Y/N</u>	<u>Y/N</u>	<u>Y/N</u>	<u>Y/N</u>
# Tip Bags	<u>12</u>	<u>12</u>							<u>40</u>	<u>40</u>
Comments:									<u>0</u>	<u>0</u>

Report Store Operating Funds	
Signature: _____	\$ Amount Entered: _____

Attach validated deposit slip/courier slip and deposit bag receipt to this sheet

DEPOSIT INFORMATION	
Cash Controller: _____	Taken By Cash Controller: <u>Quincy Charles</u>
Preparing Deposit: <u>Mykel</u>	Date to Bank: <u>12:30</u>
Start Time: <u>12pm</u>	Time to Bank: <u>8:25</u>
Deposit Bag #: <u>128616965</u>	Deposit Bag #: <u>128616965</u>
Deposit \$: <u>2647.94</u>	Bank Validated \$: <u>2647.94</u>
Completion Time: <u>12:30pm</u>	Bank Validation Time: <u>1:00pm</u>
Change Order \$: <u>None</u>	Change \$ Received: <u>None</u>
Comments:	Comments:

\*Deposit Witness confirms that cc initials, completion time, deposit slip amount and sealed deposit bag # are accurately recorded in Deposit Prep section.

\*\*Banking Witness confirms that the cc initials, date and time of cc departure to bank and sealed bag # are accurate and recorded in the Deposit to Bank section.

PARTNER TILL AUDIT #1	
Store Manager: _____	Date: _____
Partner Name: _____	Register ID: _____
Over/Short \$: _____	Comments: _____

PARTNER TILL AUDIT #2	
Store Manager: _____	Date: _____
Partner Name: _____	Register ID: _____
Over/Short \$: _____	Comments: _____

PARTNER TILL AUDIT #3	
Store Manager: _____	Date: _____
Partner Name: _____	Register ID: _____
Over/Short \$: _____	Comments: _____

PARTNER TIP DROP LOG				
PARTNER #	INITIALS	DROP BAG #	WITNESS (mandatory)	TIME

DM VERIFICATION	
DM Signature: _____	Date Reviewed: _____
Comments: _____	

PARTNER TIP REMOVAL (weekly)			
PARTNER #	INITIALS	TIME	
CC WITNESS (mandatory):			
DROP BAG #'S: _____			

\*Witness on tip drop removals must be the scheduled cash controller.

## Cash Management Log

## STORE COMMUNICATIONS

DAY -

THURSDAY

DATE

8/28/12

## REGISTER 1 TOP

TILL DROP LOG

PARTNER NAME	DROP BAG #	CC INITIALS	TIME
?	BP9932572	(P)	7:03 PM

## REGISTER 1 BOTTOM

TILL DROP LOG

PARTNER NAME	DROP BAG #	CC INITIALS	TIME

## REGISTER 2 TOP

TILL DROP LOG

PARTNER NAME	DROP BAG #	CC INITIALS	TIME
Aiden	BP9923560	(P)	7:03 PM

## REGISTER 2 BOTTOM

TILL DROP LOG

PARTNER NAME	DROP BAG #	CC INITIALS	TIME
Valentina	BP9923570	(P)	8:39 PM

## REGISTER 3 TOP

TILL DROP LOG

PARTNER NAME	DROP BAG #	CC INITIALS	TIME

## REGISTER 3 BOTTOM

TILL DROP LOG

PARTNER NAME	DROP BAG #	CC INITIALS	TIME

## REGISTER 4 TOP

TILL DROP LOG

PARTNER NAME	DROP BAG #	CC INITIALS	TIME

## REGISTER 4 BOTTOM

TILL DROP LOG

PARTNER NAME	DROP BAG #	CC INITIALS	TIME

CHASE  
CHASE  
CHASE  
CHASE  
CHASE  
CHASE  
CHASE  
CHASE

Open a Home Equity Line of Credit,  
Consolidate your debt,  
Remodel your home, Pay for college,  
Talk to a Personal Banker today!

My Transaction Summary

\*\*\*\*\*  
Transaction #59  
Account Number Ending In: 9582  
Checking Deposit \$2,247.94  
Cash Amount \$2,247.94

Further review may result in delayed  
availability of this deposit  
\*\*\*\*\*

JPMorgan Chase Bank, N.A.  
Sheridan Square, Branch 000694  
1-800-935-9935  
Member FDIC, Equal Housing Lender  
Please keep your receipt  
08/25/2010 13:05

Business Date 08/25/2010  
Session #34

Thank you - Rahat  
Cashbox #04

**TranSource®**

8/25/10

**DEPOSIT TICKET**

		DOLLARS	CENTS
CURRENCY		22	47
COIN			
CHECKS LIST EACH SEPARATELY			
1			
2			
3			
4			
5			
6			
7			
8			
9			
10			
11			
12			
13			
14			
15			
16			
17			
18			
19			
20			
DEPOSIT PREPARED BY		[Signature]	
DEPOSIT VERIFIED BY		[Signature]	
PRINT NAME		[Signature]	
DEPOSIT BAG		128016965	
<b>TOTAL</b>		22	47

PLEASE BE SURE ALL ITEMS ARE PROPERLY ENDORSER

**STARBUCKS COFFEE COMPANY**  
STORE #7547  
SHERIDAN SQUARE (72 GROVE ST)

**JPMORGAN CHASE BANK**

77547 1:5602010221 7771895821

**DEPOSIT TICKET**

**TOTAL ITEMS**

ORDER #224169045

**Cash Management Log**DAY- Thursday DATE - 8/26/10**SAFE COUNT**

NAME	OPEN: <u>2000</u>		MID 1:		MID 2:		MID 3:		CLOSE: <u>14/00</u>	
	START	END	START	END	START	END	START	END	START	END
SAFE COUNT										
TIME	<u>5:15</u>	<u>12:18</u>							<u>7:15</u>	<u>8:40</u>
\$0.01	<u>20</u>	<u>20</u>							<u>12</u>	<u>12</u>
\$0.05	<u>14</u>	<u>14</u>							<u>12</u>	<u>12</u>
\$0.10	<u>6</u>	<u>6</u>							<u>3</u>	<u>3</u>
\$0.25	<u>13</u>	<u>13</u>							<u>8</u>	<u>8</u>
\$1.00	<u>249</u>	<u>249</u>							<u>242</u>	<u>242</u>
\$2.00	<u>8</u>	<u>8</u>							<u>8</u>	<u>8</u>
\$5.00	<u>201</u>	<u>201</u>							<u>151</u>	<u>143</u>
\$10.00	<u>11</u>	<u>11</u>							<u>14</u>	<u>16</u>
\$20.00	<u>22</u>	<u>22</u>							<u>37</u>	<u>38</u>
OTHER \$'s	<u>8</u>	<u>8</u>							<u>8</u>	<u>8</u>
Total Change Fund	<u>2000</u>	<u>2000</u>							<u>2002</u>	<u>2002</u>
# Tills/Total \$	<u>8/249</u>	<u>Actual</u>							<u>Active</u>	<u>7/240</u>
# Till Drops	<u>12</u>	<u>12</u>							<u>70</u>	<u>70</u>
Cust. Recov. Cert.	<u>81</u>	<u>31</u>							<u>31</u>	<u>31</u>
P-Card	<u>Y/N</u>	<u>Y/N</u>	<u>Y/N</u>	<u>Y/N</u>	<u>Y/N</u>	<u>Y/N</u>	<u>Y/N</u>	<u>Y/N</u>	<u>Y/N</u>	<u>Y/N</u>
# Tip Bags	<u>12</u>	<u>12</u>							<u>70</u>	<u>70</u>
Comments:										

**Report Store Operating Funds**

Signature:	\$ Amount Entered:
------------	--------------------

Attach validated deposit slip/courier slip and deposit bag receipt to this sheet

**DEPOSIT INFORMATION**

Deposit Prep		Deposit to Bank	
Cash Controller:		Taken By Cash Controller:	<u>Kim</u>
Preparing Deposit:	<u>Andy Clark</u>	Date to Bank:	<u>8/26</u>
Start Time:	<u>12:00p</u>	Time to Bank:	<u>1:40</u>
Deposit Bag #:	<u>1056169410</u>	Deposit Bag #:	<u>228 (1056169410)</u>
Banking Witness:		Banking Witness:	
Deposit \$:	<u>15041.67</u>	Bank Validated \$:	<u>N/A</u>
Completion Time:	<u>12:30p</u>	Bank Validation Time:	
Change Order \$:		Change \$ Received:	
Comments:			

\*Deposit Witness confirms that cc initials, completion time, deposit slip amount and sealed deposit bag # are accurately recorded in Deposit Prep section.

\*\*Banking Witness confirms that the cc initials, date and time of cc departure to bank and sealed bag # are accurate and recorded in the Deposit to Bank section.

**PARTNER TILL AUDIT #1**

Store Manager:	<u>Andy Clark</u>
Date:	<u>8/26</u>
Partner Name:	<u>5:11</u>
Register ID	<u>100000</u>
Over/Short \$:	<u>+ \$1.05</u>
Comments:	

**PARTNER TILL AUDIT #2**

Store Manager:	
Date:	
Partner Name:	
Register ID	
Over/Short \$:	
Comments:	

**PARTNER TILL AUDIT #3**

Store Manager:	
Date:	
Partner Name:	
Register ID	
Over/Short \$:	
Comments:	

**PARTNER TIP DROP LOG**

PARTNER #	INITIALS	DROP BAG	WITNESS (mandatory)	TIME
<u>1625485</u>	<u>HK</u>	<u>49991332</u>	<u>SL</u>	<u>1:30P</u>
		<u>49991331</u>		

**PARTNER TIP REMOVAL (weekly)**

PARTNER #:		INITIALS:	
CC WITNESS (mandatory):		TIME:	
DROP BAG #'S:			

\*Witness on tip drop removals must be the scheduled cash controller

**DM VERIFICATION**

DM Signature:	Date Reviewed:
Comments:	

**Cash Management Log****STORE COMMUNICATIONS**

DAY -

DATE -

REGISTER 1 TOP		TILL DROP LOG	
PARTNER NAME	DROP BAG #	CC INITIALS	TIME

REGISTER 1 BOTTOM		TILL DROP LOG	
PARTNER NAME	DROP BAG #	CC INITIALS	TIME

REGISTER 2 TOP		TILL DROP LOG	
PARTNER NAME	DROP BAG #	CC INITIALS	TIME

REGISTER 2 BOTTOM		TILL DROP LOG	
PARTNER NAME	DROP BAG #	CC INITIALS	TIME

REGISTER 3 TOP		TILL DROP LOG	
PARTNER NAME	DROP BAG #	CC INITIALS	TIME

REGISTER 3 BOTTOM		TILL DROP LOG	
PARTNER NAME	DROP BAG #	CC INITIALS	TIME


REGISTER 4 TOP		TILL DROP LOG	
PARTNER NAME	DROP BAG #	CC INITIALS	TIME

REGISTER 4 BOTTOM		TILL DROP LOG	
PARTNER NAME	DROP BAG #	CC INITIALS	TIME

**TranSource**

DATE 8/26/10

**DEPOSIT TICKET**

 **STARBUCKS COFFEE COMPANY**  
STORE #7547  
SHERIDAN SQUARE (72 GROVE ST)

JP MORGAN CHASE BANK

	DOLLARS	CENTS
CURRENCY		
COIN		
CHECKS <small>LIST EACH SEPARATELY</small>		
1		
2		
3		
4		
5		
6		
7		
8		
9		
10		
11		
12		
13		
14		
15		
16		
17		
18		
19		
20		

**DEPOSIT PREPARED BY** [Signature]

**DEPOSIT VERIFIED BY** [Signature]

**PRINT NAME** [Signature]

**DEPOSIT BAG #** 12789432

**TOTAL** 202

PLEASE BE SURE ALL ITEMS ARE PROPERLY ENDORSED

**DO NOT RETURN**  
CALL 1-800-764-5445  
AND REFERENCE  
ORDER #22UM9045

**TOTAL ITEMS** 1

CHECKS AND OTHER ITEMS ARE TO BE DEPOSITED IN THE BAG FROM COMMERCIAL OR INDIVIDUALS. CHECKS CAN BE AVAILABLE FOR IMMEDIATE WITHDRAWAL.

**DEPOSIT-TICKET**

7547 156020102211 77716958211



## Cash Management Log

## STORE COMMUNICATIONS

DAY -

DATE -

## REGISTER 1 TOP

TILL DROP LOG

PARTNER NAME	DROP BAG #	CC INITIALS	TIME
Edson	BP9932886	(GM)	2:25h

## REGISTER 1 BOTTOM

TILL DROP LOG

PARTNER NAME	DROP BAG #	CC INITIALS	TIME

## REGISTER 2 TOP

TILL DROP LOG

PARTNER NAME	DROP BAG #	CC INITIALS	TIME
Felisha	BP99323584	(JB)	2:24h

## REGISTER 2 BOTTOM

TILL DROP LOG

PARTNER NAME	DROP BAG #	CC INITIALS	TIME

## REGISTER 3 TOP

TILL DROP LOG

PARTNER NAME	DROP BAG #	CC INITIALS	TIME

## REGISTER 3 BOTTOM

TILL DROP LOG

PARTNER NAME	DROP BAG #	CC INITIALS	TIME

## REGISTER 4 TOP

TILL DROP LOG

PARTNER NAME	DROP BAG #	CC INITIALS	TIME

## REGISTER 4 BOTTOM

TILL DROP LOG

PARTNER NAME	DROP BAG #	CC INITIALS	TIME

DRB 16427

## Cash Management Log

## STORE COMMUNICATIONS

DAY - Sunday

DATE - 8-28-10

## REGISTER 1 TOP

TILL DROP LOG

PARTNER NAME	DROP BAG #	CC INITIALS	TIME
Val	23600	R	4:30

## REGISTER 1 BOTTOM

TILL DROP LOG

PARTNER NAME	DROP BAG #	CC INITIALS	TIME
Bahn	CP23600	AS	12:00

## REGISTER 2 TOP

TILL DROP LOG

PARTNER NAME	DROP BAG #	CC INITIALS	TIME
Angie	23602	R	4:30

## REGISTER 2 BOTTOM

TILL DROP LOG

PARTNER NAME	DROP BAG #	CC INITIALS	TIME

## REGISTER 3 TOP

TILL DROP LOG

PARTNER NAME	DROP BAG #	CC INITIALS	TIME

## REGISTER 3 BOTTOM

TILL DROP LOG

PARTNER NAME	DROP BAG #	CC INITIALS	TIME

## REGISTER 4 TOP

TILL DROP LOG

PARTNER NAME	DROP BAG #	CC INITIALS	TIME

## REGISTER 4 BOTTOM

TILL DROP LOG

PARTNER NAME	DROP BAG #	CC INITIALS	TIME

**TranSource**

DATE 8/25/10

**DEPOSIT TICKET**

**STARBUCKS COFFEE COMPANY**  
STORE #7547  
SHERIDAN SQUARE (72 GROVE ST.)

JP MORGAN CHASE BANK

		DOLLARS	CENTS
CURRENT		2154	04
COIN		7	04
CHECKS LIST EACH SEPARATELY			
1			
2			
3			
4			
5			
6			
7			
8			
9			
10			
11			
12			
13			
14			
15			
16			
17			
18			
19			
20			

DEPOSIT PREPARED BY [Signature]

DEPOSIT VERIFIED BY [Signature]

PRINT NAME Kevin Noye

DEPOSIT BAG # 12861091034

**TOTAL** 2191 04

PLEASE BE SURE ALL ITEMS ARE PROPERLY ENDORSER

TO REORDER  
CALL 1-800-750-4345  
AND REFERENCE  
ORDER #22UM9045

**DEPOSIT TICKET**

## Cash Management Log

DAY: Sunday DATE: 8/29/10

SAFE COUNT										
NAME	OPEN	MID 1:	MID 2:	MID 3:	CLOSE:					
SAFE COUNT	START	END	START	END	START	END	START	END	START	END
TIME	5:30A	1:03P			1:55P	4:30P			4:20P	12:00
\$0.01	36	36			36	36			36	24
\$0.05	28	28			28	28			28	25
\$0.10	12	12			12	12			12	6
\$0.25	28	28			28	25			25	20
\$1.00	146	161			161	121			121	134
\$2.00	0	0			0	0			0	0
\$5.00	40	57			57	17			17	0
\$10.00	14	18			18	18			18	5
\$20.00	55	48			48	62			62	71
OTHER \$'s	0	0			0	0			0	0
Total Change Fund	2000	2000			2000	2000			2000	2000
# Tills/Total \$	4/200	Active			Active	Active			Active	Active
# Till Drops	40	40			40	40			40	40
Cust. Recov. Cert.	31	24			24	24			24	24
P-Card	Y/N	Y/N	Y/N	Y/N	Y/N	Y/N	Y/N	Y/N	Y/N	Y/N
# Tip Bags	40	40			40	40			40	40
Comments:	(9)	(2)								

Report Store Operating Funds	
Signature:	\$ Amount Entered:

Attach validated deposit slip/courier slip and deposit bag receipt to this sheet

DEPOSIT INFORMATION	
Cash Controller:	Taken By Cash Controller:
Preparing Deposit:	Date to Bank:
Start Time:	Time to Bank:
Deposit Bag #:	Deposit Bag #:
Deposit \$:	Bank Validated \$:
Completion Time:	Bank Validation Time:
Change Order \$:	Change \$ Received:
Comments:	Comments:

\*Deposit Witness confirms that cc initials, completion time, deposit slip amount and sealed deposit bag # are accurately recorded in Deposit Prep section.

\*Banking Witness confirms that the cc initials, date and time of cc departure to bank and sealed bag # are accurate and recorded in the Deposit to Bank section.

PARTNER TILL AUDIT #1
Store Manager:
Date:
Partner Name:
Register ID:
Over/Short \$:
Comments:

PARTNER TILL AUDIT #2
Store Manager:
Date:
Partner Name:
Register ID:
Over/Short \$:
Comments:

PARTNER TILL AUDIT #3
Store Manager:
Date:
Partner Name:
Register ID:
Over/Short \$:
Comments:

PARTNER TIP DROP LOG				
PARTNER #	INITIALS	DROP BAG #	WITNESS (mandatory)	TIME
103355	4	46478577	SL	1:49
103355	4	46478580	SL	1:49
103355	4	40478581	SL	1:49

DM VERIFICATION	
DM Signature:	Date Reviewed:
Comments:	

PARTNER TIP REMOVAL (weekly)	
PARTNER #	INITIALS
CC WITNESS (mandatory)	TIME
DROP BAG #S:	

\*Witness on tip drop removals must be the scheduled cash controller.

# TransSource

DATE 5/29/10

**DEPOSIT TICKET**

	DOLLARS	CENTS
CURRENCY	<u>365</u>	
COIN		<u>74</u>
CHECKS <small>(DEPOSIT SEPARATELY)</small>		
1		
2		
3		
4		
5		
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19		
20		

STARBUCKS COFFEE COMPANY  
STORE #7547  
SHERIDAN SQUARE (72 GROVE ST)  
CHASE BANK

DEPOSIT PREPARED BY [Signature]

DEPOSIT VERIFIED BY

PRINT NAME Karin Naylor

DEPOSIT BAG # 12561164626

\$ 365.74

**TOTAL** 3008

PLEASE BE SURE ALL ITEMS ARE PROPERLY ENDORSED

**TOTAL ITEMS**

CHECKS AND OTHER ITEMS ARE RETURNED TO THE BANK. FROM COMMERCIAL CODE OR AGREEMENT. DEPOSITS MAY NOT BE AVAILABLE FOR IMMEDIATE WITHDRAWAL.

TO ORDER  
CALL 1-888-750-4545  
AND REFERENCE  
ORDER #ZZUM9045

## DEPOSIT TICKET

## CASH MANAGEMENT TROUBLESHOOTING

**ISSUE: Till is short opening fund when CC counts down drawer after final use.**

Possible Causes:

- Drop box funds were not pulled.
- Drop box swept and till drop made without realization that till would not be used again that day.
- Paid Out brought drawer below opening funds.
- Register partner dropped funds in wrong drop box.

Solution:

1. Verify drop box funds were pulled (do not mix funds from other Register ID's).
2. Calculate funds needed to bring till to opening fund (whole \$ amount only) and remove that amount from change bank.
3. **Record removal of funds (\$ amount and Register ID (#, Top/Bottom)) on Comments section of Safe Count Log.**
4. The shortage in the change bank must be corrected when the deposit is prepared.

**NEXT DAY:**

1. Before beginning to prepare the deposit, to balance the change bank, review Comments section of the Safe Count Log from the previous day to determine which Register ID was associated with the change bank shortage.
2. Remove funds from the last logged till drop bag of that Register ID and place funds in the change bank to return it to the correct amount.
3. **Record removal of funds (\$ amount and Register ID (#, Top/Bottom)) on the Comments section of the Deposit Prep Log.**

**ISSUE: Unassigned till is over opening funds.**

Possible Causes:

- Drop box funds were not pulled the last time the till was closed.
- Till drop was made without realization that the till would not be used again that day.
- Funds were dropped from another till in this till's drop box.

Solution:

1. Using the cash scale in cash calculator mode return the till to opening fund.
2. Refer to the Till Drop Log to determine which partner was the last to use that Register ID.
3. Place extra funds in till drop bag and record Register ID (#, Top/Bottom), the final register partner's name, and "extra funds drop" on the till drop bag.
4. Record till drop bag in the correct Till Drop section per normal.

**NEXT DAY:**

1. When preparing the deposit combine the contents of the two drop bags before entering that partner's till funds at the MWS.

**ISSUE: Forgot to pull drop box funds and sales media before next register partner begins ringing transactions.**

Possible Cause: Drop box funds and sales media not pulled by CC before next register partner begins to ring transactions.

Solution:

1. As soon as possible, pull drop box funds and sales media and prepare a till drop per normal.
2. Make a note on the till drop bag that funds/sales media were pulled late.

**ISSUE: There are no drop box funds/sales media to pull and drop after register partner closes till.**

Possible Cause: Register partner rang very few transactions and received no 20's or sales media.

Solution:

1. Even though there are no funds or sales media to drop, prepare a till drop bag per normal, placing the Closing Register Receipt in the bag.
2. Record the till drop bag on the Till Drop Log under the appropriate Register ID (#, Top/Bottom) and secure the till drop bag in the safe.

**ISSUE: "undocumented till drop bag" Till drop bag in safe; not logged on Till Drop Log; no till assignment listed on MWS.**

Possible Causes:

- Till drop not recorded when a drawer overage was found and dropped.
- Change bank was over during safe count and overage was removed to balance safe.
- Funds were discovered FOH and were dropped without documentation.

Solution:

1. Look for any documentation on CML, on or inside bag (Register ID or Closing Register Receipt) to indicate source of funds.
2. If funds belong to an identified partner combine the contents of the two drop bags before entering that partner's till funds at the MWS.
  - If the partner had two till assignments, combine the contents of the two drop bags that are from the same Register ID before entering that partner's till funds at the MWS.

**NOTE:** If the Register ID is unknown, combine the contents of the undocumented till drop bag to one of the identified partner's till drop bags before entering that partner's till funds at the MWS. This will create an overage in one of the partner's Register ID Drawer O/S and a shortage in the partner's other Register ID Drawer O/S. These two Drawer O/S should balance each other out.

3. If funds belong to a Register ID but no partner is identified, combine the contents of the undocumented till drop bag with the contents of the till drop bag of the final partner assigned to that Register ID before entering that partner's till funds at the MWS.
4. If funds can not be matched to a partner or Register ID, the funds will be added to the deposit total after all other till drop bags have been processed and accepted.
5. **After adjusting the deposit total to include the undocumented till drop bag funds make a note in the Deposit Prep section Comments box. Notify Sales Audit (Explain Over/Short to Sales Audit).**

**ISSUE: Consolidated till drop bag funds do not match MWS deposit total:**

Possible Cause:

- A data entry error was made when entering funds at the MWS during the recount process.
- A till assignment was not Accepted (Y) on the MWS deposit screen.
- An error was made when counting funds.

Solution:

1. Recount consolidated deposit funds using the cash scale in cash calculator mode.
2. Verify that all till assignments have been Accepted (Y) on the MWS deposit screen.
3. Adjust deposit total to match actual funds on hand and accept deposit.
4. **Make a note in the Deposit Prep section Comments box of the deposit adjustment amount. Notify Sales Audit (Explain Over/Short to Sales Audit).**

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Week 2  
Aug 30 - Sep 5

**Cash Management Log Policies, Standards & Procedures**

The Cash Management Log must be completed each day. Print legibly and complete in pen.  
Store operating funds and tip funds must be secured at all times.

**Till Drop Procedure (Cash Controller):**

1. Record register partner's name, Register ID (#, Top/Bottom), date and CC initials on till drop bag.
2. Place funds from drop box, sales media from POS drawer and Closing Register Receipt in till drop bag. Seal till drop bag.
3. Record register partner name, entire till drop bag #, CC initials and time on the matching Register ID section of the Till Drop Log.
4. Secure till drop bag in inner compartment of safe, behind door 2.

**Final Use Till Count Procedure (Cash Controller):**

1. Remove till, sales media from POS drawer, funds from drop box and Closing Register Receipt.
2. Count down combined funds from till and drop box using cash scale in cash calculator mode.
3. Remove funds in excess of opening fund amount, leaving opening fund amount in till.
4. Follow Till Drop Procedure to secure excess funds, sales media and closing register receipt.
5. Secure till with verified opening fund in POS drawer or safe.

**Safe Count Procedure (Cash Controller):**

The safe must not be left open and unattended.

The safe must not be opened or the time delay set during the first 30 minutes and the last 30 minutes of customer operations.

Only the Cash Controller may set and access the safe.

Complete and record an accurate physical "start" count when accepting the cash controller keys and an "end" count when passing the cash controller keys to the next cash controller or counting out at the end of day.

1. Record CC initials and start or end count time on the Safe Count Log.
2. Count and record change fund amount, opening till fund amounts, # of till drops, # of Customer Recovery certificates, PCard, and # of tip drops.

NOTE: Lock Out Period Safes: When completing a safe count during the Lockout Period (3pm-8am) record "N/A" or "Locked Out" in the number of till and tip drop section of the safe count. All safe counts occurring outside of the lockout period (8am-3pm) must include an actual physical count of all till and tip drop bags.

**Deposit Log (Cash Controller):**

NOTE: Procedures for preparing the deposit and transporting the deposit to the bank are located in the Store Operations manual section 4 Cash Control.

The deposit must be prepared and transported to the bank every day.

The deposit must be prepared after 8am and must be transported to the bank by 3pm.

The deposit must be taken inside the bank for processing if the bank is open. The weekend depository box must only be used if the bank is closed.

**Deposit Prep Section Procedure:**

1. Record the start time and CC initials in the Deposit Prep section on the date the deposit is processed.
2. Record deposit \$, deposit bag # and completion time.
3. **Deposit Witness** records their initials after confirming that the CC initials, completion time, deposit slip amount and sealed deposit bag # are accurately recorded in the Deposit Prep section.
4. Secure sealed deposit bag in inner compartment of safe, behind door 2, if not immediately transported to bank.

**Deposit to Bank Section Procedure:**

1. Record CC name taking deposit to bank, date to bank, time to bank and deposit bag # in the Deposit to Bank section on the date the deposit is processed.
2. **Banking Witness** records their initials after confirming that the CC initials, date and time of the CC departure to bank and sealed bag # are accurate and recorded in the Deposit to Bank section.
3. Record validated deposit amount and validated time on Deposit to Bank section and attach validated deposit slip after returning from the bank or when the deposit slip has been retrieved for deposits made through the weekend depository.

**Till Audit Procedure (Store Manager):**

A minimum of two random till audits must be performed each week.

1. Follow steps 1-4 of Final Use Till Count.
2. Record SM name, date, register partner's name and Register ID on Partner Till Audit Log. Over/short will be recorded when deposit is prepared.
3. Secure till with verified opening fund in POS drawer or safe.
4. Ensure over/short is recorded after deposit is prepared on following day.

**Report Store Operating Funds Procedure (Store Manager):**

The Store Operating Funds (change bank and till bank) must be physically verified and updated on the MWS each week.

1. From the MWS select "Manager Menu", "Daily Bookkeeping Menu", "Report Store Operating Funds"
2. F1 – to Count Change/Till Bank Funds. Enter the amount of money actually in the Change and Till Bank in the two fields "Total Change Bank" and "Total Assigned/Unassigned Tills". Record the total on the Cash Management Log under "Report Store Operating Funds" and sign off.
3. Upon completion of entering the funds amounts press "F1" to Save and then "F7" to Quit.

**Tip Drop Procedure (all partners):**

Tip funds must be secured at all times.

1. Remove tip funds from plexi, place funds in a tip drop bag and seal tip drop bag.
2. Record date on tip drop bag.
3. Record partner #, initials, and entire tip drop bag # on the Tip Drop Log.
4. Secure tip drop bag in inner compartment of safe, behind door 2.
5. Witness records their initials and time after verifying the tips have been secured in the safe.

**Tip Drop Removal Procedure**

1. Remove tip drop bags from inner compartment of safe (cash controller).
2. Record entire tip drop bag # for each tip drop bag on Partner Tip Removal Log.
3. Record CC initials as **Witness** and time.
4. Transfer tip drop bags to partner processing tips.
5. Partner receiving tip drop bags records partner # and initials after verifying tip drop bag #'s.

**Accountability and Duty to Report**

Failure to comply with cash management log policy endangers partner safety. Acts in violation or omissions of policy are grounds for disciplinary action up to and including termination. Uncorrected or continuing violations must be reported to management, your local Partner Resources generalist or the Standards of Business Conduct Helpline at 800/611-7792.



A series of horizontal lines for writing, spanning the width of the page.



# Corrective Action Form

Store Number & Name: 13538 27<sup>th</sup> & 7<sup>th</sup> Ave  
 Partner Name: Carlos Montero Partner Number: \_\_\_\_\_  
 Manager's Name: Steven Rivera Today's Date: 8/24/2009

## Statement of Situation

### Manager's Statement

Describe the situation using specific examples. Use Corrective Action Plan Form, if necessary.

Date of Occurrence(s): 7/22, 8/1

Description:

On these dates Carlos failed to ensure that the NWS deposit section was electronically closed out. This results in a discrepancy within reported cash over short.

Further violation of Starbucks standards, policies and procedures may result in further corrective action up to and including separation.

### Partner's Statement

Date of Occurrence(s): \_\_\_\_\_

Description:

## Corrective Action

(circle one) Verbal Written Final Written

Date: 8/24/09 By Whom: S. Rivera

(circle one) Verbal Written Final Written

Date: \_\_\_\_\_ By Whom: \_\_\_\_\_

Comments: Carlos must ensure that he processes deposits correctly to avoid misreporting information.

Comments:

☐

Partner scheduled to meet for follow-up evaluation on \_\_\_\_\_ to review Action Plan to improve performance.

☐

See attached Action Plan.

☐

Other:

## Reinforcing Improved Performance

Date: \_\_\_\_\_ Performance has (circle one): improved not improved

If performance has improved:

If performance has NOT improved:

Specific description of how partner performance has improved:

Action Taken:

Action Plan for continued reinforcement of improved performance:

Gurtoy - 25

Signatures

Manager preparing form

Date

Next level manager

Date

I have read the above document and understand the information.

Partner

Date

SKU 984306

Yellow Copy-Partner Records (Mailstop S-PSS)

Pink Copy-Manager/Store Copy

Blue Copy-Partner

## 4 POINT PERFORMANCE RATING SCALE PARTNER ACTION NOTICE

DEC 1 2010

(CLICK HERE TO SELECT ACTION) → SEPARATION (Secs. 1, 10, 12)

**1) BASIC INFORMATION: COMPLETE FOR ALL TRANSACTIONS**

PARTNER NUMBER 236829	LAST NAME Montero	FIRST & MIDDLE NAME Carlos	KNOWN AS
SOCIAL SECURITY/INSURANCE # (New / Rehire Only)	STORE/ DEPT. NAME 27 <sup>th</sup> and 7 <sup>th</sup>	STORE/ DEPT. # 13538	STATE/ PROVINCE NY

**2) PERSONAL INFORMATION: Complete for new hires, rehires and personal data changes**

BIRTHDATE / /	<input type="checkbox"/> Single <input type="checkbox"/> Married	<input type="checkbox"/> Male <input type="checkbox"/> Female	Emergency Contact Name Emergency Contact Phone # ( ) -
STREET ADDRESS		CHANGE NAME TO:	
CITY	STATE/PROVINCE	ZIP/POSTAL CODE	HOME PHONE ( ) -

**3) NEW HIRE/REHIRE: (For U.S., Complete & submit I-9 and WOTC forms)**

EFFECTIVE DATE / /	<input type="checkbox"/> NEW HIRE <input type="checkbox"/> FULL TIME <input type="checkbox"/> REGULAR <input type="checkbox"/> REHIRE <input type="checkbox"/> PART TIME <input type="checkbox"/> TEMPORARY	POSITION NAME	STARTING PAY \$ _____ PER <input type="checkbox"/> HR <input type="checkbox"/> YR
REGIONAL OFFICES AND SSC ALSO COMPLETE THIS SECTION →		POSITION #	JOB TITLE
		JOB #	

**4) MERIT INCREASE: PERFORMANCE REVIEW MUST ALSO BE COMPLETED**

EFFECTIVE DATE / /	<input type="checkbox"/> CONSISTENTLY EXCEEDS EXPECTATIONS <input type="checkbox"/> ABOVE EXPECTATIONS <input type="checkbox"/> MEETS EXPECTATIONS <input type="checkbox"/> MUST IMPROVE	ASSISTANT MANAGERS AND PLANT HOURLY: OVERALL NUMERIC RATING _____	FROM \$ _____ PER <input type="checkbox"/> HR <input type="checkbox"/> YR TO \$ _____ PER <input type="checkbox"/> HR <input type="checkbox"/> YR
-----------------------	---	--	--

**5) PROMOTION**

EFFECTIVE DATE / /	TO POSITION NAME	<input type="checkbox"/> IN-PLACE PROMOTION <input type="checkbox"/> PROMOTE TO VACANT POSITION	STORE/DEPT#	FROM \$ _____ PER <input type="checkbox"/> HR <input type="checkbox"/> YR
				TO \$ _____ PER <input type="checkbox"/> HR <input type="checkbox"/> YR
REGIONAL OFFICES AND SSC ALSO COMPLETE THIS SECTION →		TO POSITION #	JOB TITLE	JOB #

**6) TRANSFER, POSITION AND/OR LOCATION CHANGE**

EFFECTIVE DATE / /	TO POSITION NAME	STORE/DEPT #	FROM \$ _____ PER <input type="checkbox"/> HR <input type="checkbox"/> YR
			TO \$ _____ PER <input type="checkbox"/> HR <input type="checkbox"/> YR
REGIONAL OFFICES AND SSC ALSO COMPLETE THIS SECTION →		TO POSITION #	JOB TITLE
			JOB #

**7) OTHER CHANGE: Please provide comments pertaining to change**

EFFECTIVE DATE / /	COMMENTS	FROM \$ _____ PER <input type="checkbox"/> HR <input type="checkbox"/> YR
		TO \$ _____ PER <input type="checkbox"/> HR <input type="checkbox"/> YR

**9) EXPATRIATE-INTERNATIONAL ASSIGNMENT**

START DATE	EXPECTED RETURN	ACTUAL RETURN	CITY	COUNTRY
/ /	/ /	/ /		

**10) SEPARATION: For Store Partners Only: Send store file to Regional Office**

SEPARATION DATE 12/09/10	VOLUNTARY SEPARATION Click here \ SELECT REASON Explain "OTHER" here:	INVOLUNTARY SEPARATION Click here \ Cash handle issues: PAP Explain "OTHER" here:
-----------------------------	---	---

ELIGIBLE FOR REHIRE ☐ YES-OTHER POSITION ☐ YES-SAME POSITION ☒ NO-EXPLAIN IN COMMENTS BELOW

I HEREBY AUTHORIZE STARBUCKS COFFEE COMPANY TO DEDUCT \$ \_\_\_\_\_ FROM MY FINAL PAYCHECK FOR MONEY I OWE TO STARBUCKS COFFEE COMPANY FOR \_\_\_\_\_

**11) BONUS: (For referral bonus, provide name and partner number of referred partner in Section 12 below-Comments field.)**

BONUS TYPE: Click here \ SELECT TYPE	BONUS AMOUNT: \$	CHARGE TO COST CTR:
--------------------------------------	------------------	---------------------

**12) APPROVALS & COMMENTS: Please check the Pay Notebook for approval guidelines**

MANAGER NAME Jennifer Gurtov	MANAGER TITLE District Manager	MANAGER PARTNER #282805	DATE 12/13/10
MANAGER NAME	MANAGER TITLE	MANAGER PARTNER #	DATE / /
PARTNER RESOURCES NAME	PARTNER RESOURCES TITLE	PARTNER RESOURCES PARTNER #	DATE / /

COMMENTS: On two separate occasions, Carlos took sealed deposits from his store. He deposited them into the bank 4 days later in drop bags with different numbers than the bag the deposit was in when he took it out of the store. Carlos admitted to taking the funds out of the store in a written statement.

Updated 1/27/2009

Gurtov - 26

CONFIDENTIAL

STAR\_MARSHALL0001737



# Corrective Action Form

Gurtov - 27

Store Number & Name.: \_\_\_\_\_

Partner Name: Chavis Lin Partner Number: 1205272

Manager's Name: Jennifer Gurtov Today's Date: 9/29/10

## Statement of Situation

**Manager's Statement** Describe the situation using specific examples. Use Corrective Action Plan Form, if necessary.

Date of Occurrence(s): 9/25, 9/26

Description: Chavis violated cash handling procedures by not processing deposits on a daily basis or ensuring partners process on a daily basis

Further violation of Starbucks standards, policies and procedures may result in further corrective action up to and including separation.

## Partner's Statement

Date of Occurrence(s): \_\_\_\_\_

Description: \_\_\_\_\_

## Corrective Action

(circle one) Verbal Written Final Written

Date: 9/29 By Whom: Jen Gurtov

Comments: \_\_\_\_\_

(circle one) Verbal Written Final Written

Date: \_\_\_\_\_ By Whom: \_\_\_\_\_

Comments: \_\_\_\_\_

- ☐ Partner scheduled to meet for follow-up evaluation on \_\_\_\_\_ to review Action Plan to improve performance.
- ☐ See attached Action Plan. ☐ Other: \_\_\_\_\_

## Reinforcing Improved Performance

Date: \_\_\_\_\_ Performance has (circle one): improved not improved

If performance has improved:

Specific description of how partner performance has improved:

Action Plan for continued reinforcement of improved performance:

If performance has NOT improved:

Action Taken:

## Signatures

Chavis Lin 9/29/10 Jen Gurtov 9/29/10

Manager preparing form Date Next level manager Date

I have read the above document and understand the information.

Partner

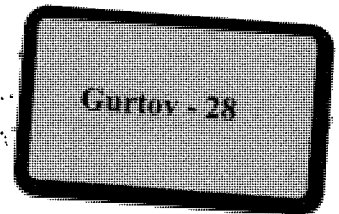
Date

SKU 984306

Yellow Copy-Partner Records (Mailstop S-PSS)

Pink Copy-Manager/Store Copy

Blue Copy-Partner



# Performance Improvement Plan

**To:** Charis Liu  
**Partner Number:** 1205272

**From:** Jennifer Gurtoy

**Date:** 04/11/11

**Subject:** Performance Improvement Plan

**Cc:** Nancy Murgalo, partner resources manager  
 Partner File

**Effective Date:** 04/11/11

Starbucks Coffee values the contributions of its partners and in return, expects partners to meet their job expectations. Our goal is to help our partners be successful in their role. As a result of your recent performance you are being placed on a 90 day Performance Improvement Plan. This plan outlines the expectations of your position, as well as, identifies specific areas where improvement in your performance is required.

Throughout this 90-day period, you will receive written documentation of your progress on meeting your job expectations. At a minimum this will occur at the end of 30 and 60 days. At the end of the 90-day period your overall performance will be reviewed. At that time, it will be determined whether you have successfully demonstrated satisfactory performance and if employment with Starbucks Coffee Company will continue.

This plan serves as a final written warning. Your failure to meet and sustain the expectations outlined in the plan will result in termination of your employment.

Although this plan is in effect for 90 days, it does not create a guarantee of continued employment. Starbucks Coffee Company retains the right to terminate employment at any time if you fail to demonstrate improvement in your performance. In addition, Starbucks Coffee Company reserves the right to amend this plan at any time.

The attached Performance Improvement Plan reviews your current performance measured against the Key Responsibilities, Other Measurements and Core Competencies of your position. It also outlines SMART (Specific, Measurable, Achievable, Realistic and Time-sensitive) goals to improve your performance.

Signing below indicates you acknowledge receipt of the Performance Improvement Plan and that you understand its purpose, intent and expectations.

<b>Partner Signature:</b>	<b>Date:</b>
<b>Manager Signature:</b>	<b>Date:</b>

- \* Chris, practicing in lip
- \* pretty close / choco. donuts in cup  
sugar flipped over
- \* few minute here  
o count bar dirty
- \* Boxes on floor Batt
- \* pictures in positive spirits
- \* bathroom is dirty:
  - o female container: no liner
  - o sink, walls, garbage can, fixtures  
need to be cleaned
- \* ask floors dirty
- \* wet floors signs dirty
- \* splash sticks against case

## To Do:

- o 1st pictures good
- o check last week's Q&A opportunities
- o look at #5
- o knowledge of CV score

**Key Responsibility, Other Measurement, Core Competency:**

**Achieves Results:** Understands what drives overall business success and is accountable to prioritize and deliver quality results. Demonstrates knowledge of core products and processes to get results.

**Anticipates obstacles and takes action to prevent or minimize their impact.**

- Prioritize and focus on what is important
- Identify and solve problems
- Deliver Results

**Current Performance Rating: MI****Summary of Current Performance:**

Charis does not execute the Plan, Do, Check, Adjust cycle. If her original plan is not working for her, she does not make adjustments. (ie... At Home Coffee/Store Cleanliness/Customer Voice) She has not consistently followed up on execution of plans resulting in multiple areas of her operation where she has not held herself and her team to success measures. This has been evident in inconsistencies with poor execution of maintaining a clean environment to QASA standards of 90% or higher. DM consistently shares areas of opportunity from a cleanliness perspective. It takes several conversations for Charis to take action, and she has not created/maintained a system to ensure store is operating to cleanliness standards consistently. She does not regularly review the environment to ensure opportunities have improved. Charis consistently misses goals. She does not provide her team with a plan that leads to consistent success in At Home Coffee. She also does not create highly satisfied customer consistently as measured in her customer voice results as well as complaints made to DM. She does not consistently perform Values Walks nor does she hold her team of ASM/SS accountable to performing theirs. Charis reviews her customer voice results, builds a plan, but does not follow up with her team to ensure that they are doing the plan. This has led to her inability to sustain results in this metric. She does not maintain cash over/short within company standard of .05% of sales, nor hold team accountable to cash handling standards.

**SMART Tasks to Meet Expectations:** (Tasks to assist with performance improvement. Include measurement(s)).

1. Utilize At Home Coffee platform to articulate a clear picture of what success looks like and set clear expectations to partners. Utilize tools such as DCRs to communicate goals, ensure SS check USDs against goal throughout shift and communicate accordingly to next leader. Track results daily, check and adjust as needed to ensure results are being achieved. Also ensure that Area 82s At Home Coffee Plan is being executed consistently. *NO SAMPLES, conscious decision to pull samples, 2 wks into plan*
2. Charis must execute weekly QASA audits, submit previous weeks audits with corrections to DM by Monday afternoon, DM will audit monthly, goal 90% or better.
3. Charis must ensure Duty Roster is filled out completely in all areas daily. She must set clear direction to her team around the expectations regarding duty roster, the results looking to be achieved, and follow up accordingly to ensure team understands and is following direction.
4. Charis must ensure her team is completing the NY Critical Checklist 3x daily. Any opportunities need to be fixed in the moment.
5. BOH as well as FOH must be thoroughly deep cleaned and organized. Label all shelves with product name and par. Remove any unused or unneeded product from BOH. This is to be done within the first two weeks of receiving this plan and maintained consistently going forward. *boxes on floor, room clean/supplies on floor*
6. Perform Go-See Activity during most opportunistic day and day part as defined on customer voice. Do a root cause analysis to find problem that needs to be solved (Which key drivers show most opportunity for improvement?). Create thoughtful, strategic and specific Store Plan of Action, share with team to ensure consistent positive growth in overall satisfaction is achieved. Customer Voice Action Plans must be submitted to DM by the following Monday after results are available and posted upon approval. Charis must then ensure that the plan is living in her store consistently to drive a result.
7. All partners must know their Customer Voice Score and how to drive results with the behaviors of the World Class Customer Vision: Anticipate, Connect, Personalize and Own.
8. Charis must ensure she has a Values Walk completed at the beginning of each of her shifts. She must also ensure she incorporates time into her cadence to ensure that her ASM/SSs are completing Values Walks to standard and ensuring that the indicated behaviors are being demonstrated consistently and coached as needed.
9. Charis must audit her cash log weekly to ensure partners are adhering to all standards consistently. She must communicate weekly with DM on Monday's reporting all daily/weekly over/shorts as well as action taken or coaching conversations had. *cash is in line, no opp. in May cash log - Charis could ten on May 8th who doesn't know who drops the nps*

**Summary of Performance at 30 Days, May 10<sup>th</sup> @ 2p:** (Summary of performance with specific examples)

1. • clear expectations: No coffee chain plan for partners
  - DCRs: No communication of goals
  - SS: check after each / not solid plan to check + report
  - results are not being tracked daily
  - 82 plan: not being executed

DCRs not  
filled out at  
all for  
this week

2. • QASA weekly notes: 3/28, 4/4, 5/8, 5/15 (doesn't have 4/11, 4/18, 4/25, 5/1)
- Audits submitted to DM: not full that being submitted

opportunities from 5/8:  
 • personal belongings  
 • ownership bid by bar  
 (brand new)  
 ownership machine

### 3. Duty Roster:

• weekly, monthly tasks are not being filled out / once + any changes missed often

• Daily tasks: inconsistent use / missing a lot of closing shifts

• daily temp logs are complete

↓  
who is?

what is follow up

• Chris not filling out Duty Roster so bar closes

### 4. NY Critical Checklists:

• changes are to Top 25

• Jan Kelly completes back of DCR

• Chris last week's filled out, none other for prior week

### 5. Both is labeled

### 6. No CV action plan

no CV action plan for April

boat case: w/ 5/11 = go see @ 8:15 AM

• side conversation day not

• no corner to lobby since

8. Chris ~~is~~ did a VA Walk each day she works week of 5/9, however did not complete. No coaching is being done w/ Lwings (mostly unsure / via / for later)

Chris is not carrying ASMs / SSs so VA Walks being done by others

Summary of Performance at 60 Days, June 14<sup>th</sup> @ 2p: (Summary of performance with specific examples)

Summary of Performance at 90 Days, July 19<sup>th</sup> @ 2p: (Summary of performance with specific examples)

**Key Responsibility, Other Measurement, Core Competency**  
**Develops Continuously**

Continuously seeks opportunities to improve self and others. Leads with trust, honesty and commitment to hire, coach and develop partners to achieve their potential

- Know your strengths and opportunities
- Actively engage and apply learning experiences
- Supports the development of others

**Current Performance Rating: MI**

**Summary of Current Performance.**

Charis does not consistently address performance and at times, she ignores performance below company standards. She does not consistently hold team accountable to performance standards/operational procedures (ie...values walks/ny top 10 critical, dress code) or paint a clear picture for team on what success looks like from cleanliness standards, specifically from customer perspective. She has not consistently coached team to understand how they contribute to store goals of customer satisfaction and overall store success nor has she consistently held them accountable to the direction she has set. She also does not create the link of on the job assignments and work opportunities to partner development and increasing skill level. She uses similar coaching styles with all partners regardless of their individual needs

**SMART Tasks to Meet Expectations:** (Tasks to assist with performance improvement. Include measurement(s).)

1. Conduct one/one with every partner during first 30 days of plan to have development discussion. From those discussions, create succession plan in store that is forecasted 90 days out with anticipated turnover/churn and business growth. Include behaviors with timelines and milestones that enable staffing to be proactive and not reactive on all levels within store, including staffing of baristas and shift supervisors. To be provided to District Manager the first week of each month with status updates. Monitor and make timely performance management decisions on partners who are struggling to meet expectations. (dress code, time and attendance)
2. Invest time in the professional growth of others, use our partner development system to engage and inspire. This can be scheduled on administrative days or one on one, or while demonstrating and linking for partner how on the job tasks build strengths and develop partners. Coach in the moment. Keep a coaching log, plan out connections monthly, and submit recap of interactions the first week of each month to DM. Partners should have individual goals and focuses. At a minimum, one high performer should have a PDP, and one low ME performer should have an action plan in place to develop strengths and consistent meets expectations behaviors. Utilize such tools as, but not limited to PDP forms, action plans, success profiles.
3. Ensure partner reviews are completed on time. You can utilize the 6-4-2 cycle to aid in ensuring that all performance reviews are completed within guidelines and delivered on time. They must be submitted to DM the Monday prior to delivery to the partner.
4. One on ones need to happen with all SSs monthly to review prior months results of AOP and scorecard, discuss plan of action as well as what accountability looks like in achieving said results as well as strengthening skill set level
5. Ensure clear plan is in place to ensure Brandi Bravo's readiness for SM by July of FY '11.
6. Utilize planner/calendar/repeatable routine, whatever needed to ensure that information is provided to DM in a timely manner. This includes, but is not limited to Action Required e-mails, arriving at meetings on time and prepared, sending Monday Reporting numbers by 12pm, as well as end of day completion expectations.

Summary of Performance at 30 Days: (Summary of performance with specific examples)

1. has one/bare w/ all pictures / no log

Succession plan: one Jackson: Michael

no succession plan w/ dates

~~Layer: w/ Davis~~

Chats were up piercing

No plan e-mails to DM

2. No coaching log

Nothing submitted to DM

No PDP

No action plan for lower performer

- coaches new practices to perform w/ energy + personality  
(make eye contact, how are you?)

3. Review entered into computer for Diana Carrion: effective date 4/6/11

• has not yet been delivered to Diana. will be delivered on Tuesday 5/17.

<b>Summary of Performance at 60 Days:</b> (Summary of performance with specific examples)
<b>Summary of Performance at 90 Days:</b> (Summary of performance with specific examples)

<b>Key Responsibility, Other Measurement, Core Competency</b>
<b>Current Performance Rating:</b>
<b>Summary of Current Performance</b>
<b>SMART Tasks to Meet Expectations:</b> (Tasks to assist with performance improvement. Include measurement(s)).
<b>Summary of Performance at 30 Days:</b> (Summary of performance with specific examples)
<b>Summary of Performance at 60 Days:</b> (Summary of performance with specific examples)
<b>Summary of Performance at 90 Days:</b> (Summary of performance with specific examples)

<b>Key Responsibility, Other Measurement, Core Competency</b>
<b>Current Performance Rating:</b>
<b>Summary of Current Performance:</b> (Summary of recent performance with specific examples.)
<b>SMART Tasks to Meet Expectations:</b> (Tasks to assist with performance improvement. Include measurement(s)). 1. 2. 3.
<b>Summary of Performance at 30 Days:</b> (Summary of performance with specific examples)
<b>Summary of Performance at 60 Days:</b> (Summary of performance with specific examples)
<b>Summary of Performance at 90 Days:</b> (Summary of performance with specific examples)

The following provides an overall summary of your performance and progress on this plan to date:

<b>Overall Performance Summary at 30 Days:</b> (Overall summary of performance and progress to date)	
<b>Partner Signature:</b>	<b>Date:</b>
<b>Manager Signature:</b>	<b>Date:</b>

<b>Overall Performance Summary at 60 Days:</b> (Overall summary of performance and progress to date)	
<b>Partner Signature:</b>	<b>Date:</b>
<b>Manager Signature:</b>	<b>Date:</b>

<b>Overall Performance Summary at 90 Days:</b> (Overall summary of performance and progress to date)	
<b>Partner Signature:</b>	<b>Date:</b>
<b>Manager Signature:</b>	<b>Date:</b>

This Performance Improvement Plan is:

- ☐ **SUCCESSFULLY** completed and is closed.
- ☐ **UNSUCCESSFULLY** completed and as a result, the partner will be separated.

<b>Partner Signature:</b>	<b>Date:</b>
<b>Manager Signature:</b>	<b>Date:</b>

## Charis Liu- 30 Day Check In

<b>From:</b>	Jen Gurtov </O=STARBUCKS/OU=SSC/CN=RECIPIENTS/CN=JGURTOV>
<b>To:</b>	Nancy Murgalo; Victor Heutz
<b>Subject:</b>	Charis Liu- 30 Day Check In
<b>Sent:</b>	5/17/2011 8:30:56 PM +00:00
<b>Attachments:</b>	Charis Liu PIP-30 Day Check in.doc

Nancy and Victor,

I contacted PRCC, waiting to hear back from a specialist in regards to separating Charis. I wanted to provide you a copy of her 30 Day check in results.

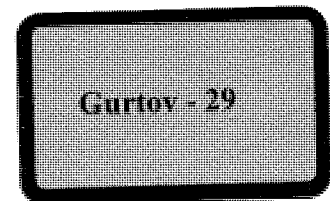
Will keep you posted once I hear from them, thanks.

*Jennifer Gurtov*

District Manager Starbucks Coffee Company 917.975.1331

**SourceLastModifiedTime:** 5/17/2011 8:30:57 PM +00:00

This HTML was generated by AccessData using data parsed from "jgurtov.pst".  
Please refer to that file for the original evidence.





### Performance Improvement Plan

**To:** Charis Liu  
**Partner Number:** 1205272

**From:** Jennifer Gurtov

**Date:** 04/11/11

**Subject:** Performance Improvement Plan

**Cc:** Nancy Murgalo, partner resources manager  
 Partner File

**Effective Date:** 04/11/11

Starbucks Coffee values the contributions of its partners and in return, expects partners to meet their job expectations. Our goal is to help our partners be successful in their role. As a result of your recent performance you are being placed on a 90 day Performance Improvement Plan. This plan outlines the expectations of your position, as well as, identifies specific areas where improvement in your performance is required.

Throughout this 90-day period, you will receive written documentation of your progress on meeting your job expectations. At a minimum this will occur at the end of 30 and 60 days. At the end of the 90-day period your overall performance will be reviewed. At that time, it will be determined whether you have successfully demonstrated satisfactory performance and if employment with Starbucks Coffee Company will continue.

This plan serves as a final written warning. Your failure to meet and sustain the expectations outlined in the plan will result in termination of your employment.

Although this plan is in effect for 90 days, it does not create a guarantee of continued employment. Starbucks Coffee Company retains the right to terminate employment at any time if you fail to demonstrate improvement in your performance. In addition, Starbucks Coffee Company reserves the right to amend this plan at any time.

The attached Performance Improvement Plan reviews your current performance measured against the Key Responsibilities, Other Measurements and Core Competencies of your position. It also outlines SMART (Specific, Measurable, Achievable, Realistic and Time-sensitive) goals to improve your performance.

Signing below indicates you acknowledge receipt of the Performance Improvement Plan and that you understand its purpose, intent and expectations.

<b>Partner Signature:</b>	<b>Date:</b>
<b>Manager Signature:</b>	<b>Date:</b>

**Key Responsibility, Other Measurement, Core Competency:**

**Achieves Results:** Understands what drives overall business success and is accountable to prioritize and deliver quality results. Demonstrates knowledge of core products and processes to get results. Anticipates obstacles and takes action to prevent or minimize their impact.

- Prioritize and focus on what is important
- Identify and solve problems
- Deliver Results

**Current Performance Rating: MI****Summary of Current Performance:**

Charis does not execute the Plan, Do, Check, Adjust cycle. If her original plan is not working for her, she does not make adjustments. (ie...At Home Coffee/Store Cleanliness/Customer Voice) She has not consistently followed up on execution of plans resulting in multiple areas of her operation where she has not held herself and her team to success measures. This has been evident in inconsistencies with poor execution of maintaining a clean environment to QASA standards of 90% or higher. DM consistently shares areas of opportunity from a cleanliness perspective. It takes several conversations for Charis to take action, and she has not created/maintained a system to ensure store is operating to cleanliness standards consistently. She does not regularly review the environment to ensure opportunities have improved. Charis consistently misses goals. She does not provide her team with a plan that leads to consistent success in At Home Coffee. She also does not create highly satisfied customer consistently as measured in her customer voice results as well as complaints made to DM. She does not consistently perform Values Walks nor does she hold her team of ASM/SS accountable to performing theirs. Charis reviews her customer voice results, builds a plan, but does not follow up with her team to ensure that they are doing the plan. This has led to her inability to sustain results in this metric. She does not maintain cash over/short within company standard of .05% of sales, nor hold team accountable to cash handling standards.

**SMART Tasks to Meet Expectations:** (Tasks to assist with performance improvement. Include measurement(s)).

1. Utilize At Home Coffee platform to articulate a clear picture of what success looks like and set clear expectations to partners. Utilize tools such as DCRs to communicate goals, ensure SS check USDs against goal throughout shift and communicate accordingly to next leader. Track results daily, check and adjust as needed to ensure results are being achieved. Also ensure that Area 82s At Home Coffee Plan is being executed consistently.
2. Charis must execute weekly QASA audits, submit previous weeks audits with corrections to DM by Monday afternoon, DM will audit monthly, goal 90% or better.
3. Charis must ensure Duty Roster is filled out completely in all areas daily. She must set clear direction to her team around the expectations regarding duty roster, the results looking to be achieved, and follow up accordingly to ensure team understands and is following direction.
4. Charis must ensure her team is completing the NY Critical Checklist 3x daily. Any opportunities need to be fixed in the moment.
5. BOH as well as FOH must be thoroughly deep cleaned and organized. Label all shelves with product name and par. Remove any unused or unneeded product from BOH. This is to be done within the first two weeks of receiving this plan and maintained consistently going forward.
6. Perform Go-See Activity during most opportunistic day and day part as defined on customer voice. Do a root cause analysis to find problem that needs to be solved (Which key drivers show most opportunity for improvement?). Create thoughtful, strategic and specific Store Plan of Action, share with team to ensure consistent positive growth in overall satisfaction is achieved. Customer Voice Action Plans must be submitted to DM by the following Monday after results are available and posted upon approval. Charis must then ensure that the plan is living in her store consistently to drive a result.
7. All partners must know their Customer Voice Score and how to drive results with the behaviors of the World Class Customer Vision: Anticipate, Connect, Personalize and Own.
8. Charis must ensure she has a Values Walk completed at the beginning of each of her shifts. She must also ensure she incorporates time into her cadence to ensure that her ASM/SSs are completing Values Walks to standard and ensuring that the indicated behaviors are being demonstrated consistently and coached as needed.
9. Charis must audit her cash log weekly to ensure partners are adhering to all standards consistently. She must communicate weekly with DM on Monday's reporting all daily/weekly over/shorts as well as action taken or coaching conversations had.

**Summary of Performance at 30 Days, May 16<sup>th</sup> @ 10a:** (Summary of performance with specific examples)

1. Charis does not have a coffee action plan for her partners and has not set clear expectations. She did not fill out DCRs with goals. She has not set direction to her shift team to check and adjust. She is not

<p>executing the Area 82 At Home Coffee Plan. She has made a conscious decision to pull samples, one of the tactics of the Area plan.</p> <ol style="list-style-type: none"> <li>Charis only has audits from 5/8 and 5/15. She has not been completing them prior to these two. She has not submitted her audits to DM.</li> <li>Duty Roster is not being filled out completely. The weekly/monthly task section is not being used at all. The once a day cleaning is not being utilized consistently. Inconsistent use of the daily task section. In reviewing the duty roster, she has not been following up with her shifts by coaching behaviors. She herself is not using the duty roster...she worked several closing shifts in which she left the entire roster blank for closing duties.</li> <li>Charis has not saved any of this material. She has one sheet complete from the week of 5/9.</li> <li>There are still many cleanliness opportunities both front of house and back of house (ie...café floors, restroom, condiment bars, wet floor signs, floor/drain area near front bar, boh milk refrigerator). Charis has labeled shelves boh with name, however not with par due to changing seasons. When I first walked into the store, there were boxes being stored on the floor, that were then removed and put away.</li> <li>Charis scheduled herself to perform a go-see. She did not use her CV report as a tool that shows bottom opportunities in key drivers. She did not create a CV action plan for either April or May. She has not sent DM an action plan, neither has she set direction with her team to elevate the customer experience.</li> <li>All partner do not know CV score and are not aligned in action steps in reference to Anticipate, Connect, Personalize, Own.</li> <li>Charis only has Values Walks from the week of 5/9. She performed one during each shift, however did not complete them. She had also said she did not coach the team with her findings. Charis is not assessing ASM/SS Values Walks, therefore not coaching to ensure completed effectively.</li> <li>Charis has made major improvement with her cash management log. She has been holding her team accountable to completing to standard. Only two opportunities were noted during DM audit...there was one section of tip drops that was not filled out completely(not known who dropped the bags)...and there was an opportunity when the mid shift did not count the safe over...she was coached by Charis.</li> </ol>
<p><b>Summary of Performance at 60 Days, June 14<sup>th</sup> @ 2p:</b> (Summary of performance with specific examples)</p>
<p><b>Summary of Performance at 90 Days, July 19<sup>th</sup> @ 2p:</b> (Summary of performance with specific examples)</p>

<p><b>Key Responsibility, Other Measurement, Core Competency</b>  <b>Develops Continuously</b>  <b>Continuously seeks opportunities to improve self and others. Leads with trust, honesty and commitment to hire, coach and develop partners to achieve their potential</b></p> <ul style="list-style-type: none"> <li>Know your strengths and opportunities</li> <li>Actively engage and apply learning experiences</li> <li>Supports the development of others</li> </ul>
<p><b>Current Performance Rating: MI</b></p>
<p><b>Summary of Current Performance</b>  Charis does not consistently address performance and at times, she ignores performance below company standards. She does not consistently hold team accountable to performance standards/operational procedures (ie...values walks/ny top 10 critical, dress code) or paint a clear picture for team on what success looks like from cleanliness standards, specifically from customer perspective. She has not consistently coached team to understand how they contribute to store goals of customer satisfaction and overall store success nor has she consistently held them accountable to the direction she has set. She also does not create the link of on the job assignments and work opportunities to partner development and increasing skill level. She uses similar coaching styles with all partners regardless of their individual needs</p>

**SMART Tasks to Meet Expectations:** (Tasks to assist with performance improvement. Include measurement(s).

1. Conduct one/one with every partner during first 30 days of plan to have development discussion. From those discussions, create succession plan in store that is forecasted 90 days out with anticipated turnover/churn and business growth. Include behaviors with timelines and milestones that enable staffing to be proactive and not reactive on all levels within store, including staffing of baristas and shift supervisors. To be provided to District Manager the first week of each month with status updates. Monitor and make timely performance management decisions on partners who are struggling to meet expectations. (dress code, time and attendance)
2. Invest time in the professional growth of others, use our partner development system to engage and inspire. This can be scheduled on administrative days or one on one, or while demonstrating and linking for partner how on the job tasks build strengths and develop partners. Coach in the moment. Keep a coaching log, plan out connections monthly, and submit recap of interactions the first week of each month to DM. Partners should have individual goals and focuses. At a minimum, one high performer should have a PDP, and one low ME performer should have an action plan in place to develop strengths and consistent meets expectations behaviors. Utilize such tools as, but not limited to PDP forms, action plans, success profiles.
3. Ensure partner reviews are completed on time. You can utilize the 6-4-2 cycle to aid in ensuring that all performance reviews are completed within guidelines and delivered on time. They must be submitted to DM the Monday prior to delivery to the partner.
4. One on ones need to happen with all SSs monthly to review prior months results of AOP and scorecard, discuss plan of action as well as what accountability looks like in achieving said results as well as strengthening skill set level
5. Ensure clear plan is in place to ensure Brandi Bravo's readiness for SM by July of FY '11.
6. Utilize planner/calendar/repeatable routine, whatever needed to ensure that information is provided to DM in a timely manner. This includes, but is not limited to Action Required e-mails, arriving at meetings on time and prepared, sending Monday Reporting numbers by 12pm, as well as end of day completion expectations.

**Summary of Performance at 30 Days:** (Summary of performance with specific examples)

1. Charis conducted a one on one with all partners, however did not log any discussions. She has not created a succession plan within the store. She continues to not hold team accountable to dress code standards, Chris Sorter continues to wear a piercing in his lip while working. Charis has also not sent DM any follow up emails regarding development/succession plan in store.
2. Charis continues to coach in the moment, but cannot speak to overall success or what that coaching entails. She has not maintained a coaching log, she has not planned out connections monthly and has not submitted a recap to DM. She does not have partners on updated PDPs, neither a low ME performer on an action plan to develop strengths and consistent ME behaviors.
3. Charis has not completed reviews on time. She had completed several epans, however had not sat down with partners...the sit down being over 30 days past review date. There were three of four reviews that were being delivered late...that should have been delivered in April.
4. Charis did not complete one on ones with SS nor ASM in review of AOP and scorecard. She does not have any active action plans, therefore, not discussing them with her in-store leadership team.
5. Charis does not have a plan to ensure her ASM Brandi Bravo is ready for SM by July of FY '11.
6. Information has not been provided to DM throughout first 30 days.

**Summary of Performance at 60 Days:** (Summary of performance with specific examples)**Summary of Performance at 90 Days:** (Summary of performance with specific examples)

<b>Key Responsibility, Other Measurement, Core Competency</b>
<b>Current Performance Rating:</b>
<b>Summary of Current Performance</b>
<b>SMART Tasks to Meet Expectations:</b> (Tasks to assist with performance improvement. Include measurement(s)).
<b>Summary of Performance at 30 Days:</b> (Summary of performance with specific examples)
<b>Summary of Performance at 60 Days:</b> (Summary of performance with specific examples)
<b>Summary of Performance at 90 Days:</b> (Summary of performance with specific examples)

<b>Key Responsibility, Other Measurement, Core Competency</b>
<b>Current Performance Rating:</b>
<b>Summary of Current Performance:</b> (Summary of recent performance with specific examples.)
<b>SMART Tasks to Meet Expectations:</b> (Tasks to assist with performance improvement. Include measurement(s)). 1. 2. 3.
<b>Summary of Performance at 30 Days:</b> (Summary of performance with specific examples)
<b>Summary of Performance at 60 Days:</b> (Summary of performance with specific examples)
<b>Summary of Performance at 90 Days:</b> (Summary of performance with specific examples)

The following provides an overall summary of your performance and progress on this plan to date:

<b>Overall Performance Summary at 30 Days:</b> (Overall summary of performance and progress to date)	
<b>Partner Signature:</b>	<b>Date:</b>
<b>Manager Signature:</b>	<b>Date:</b>

<b>Overall Performance Summary at 60 Days:</b> (Overall summary of performance and progress to date)	
<b>Partner Signature:</b>	<b>Date:</b>
<b>Manager Signature:</b>	<b>Date:</b>

<b>Overall Performance Summary at 90 Days:</b> (Overall summary of performance and progress to date)	
<b>Partner Signature:</b>	<b>Date:</b>
<b>Manager Signature:</b>	<b>Date:</b>

This Performance Improvement Plan is:

- ☐ **SUCCESSFULLY** completed and is closed.
- ☐ **UNSUCCESSFULLY** completed and as a result, the partner will be separated.

<b>Partner Signature:</b>	<b>Date:</b>
<b>Manager Signature:</b>	<b>Date:</b>



**District Meeting: 40<sup>th</sup> Anniversary  
February 14, 2011  
2p-4p**

2p: Overview/Objectives

2:15p: Coffee Tasting—Brandon and Samba

- Passports
- Introductions

2:30p: Roll-Out

3:45p: Wrap up/Miscellaneous



**District 1096 Ops Meeting**  
**October 22, 2008**  
**10a-2:30p**

10a: Coffee Tasting—David/Customer Letters

10:30a: Bold Moves Discussion

- Brewed Coffee: David and Rebekah
- Partner: All
- Customer: Serenity
- Ecosure Action Plan: All

12:30p: Break

12:45p: Promo Overviews (Fall 2/Holiday)

- Key Dates: George
- Sunday, November 2nd

1:15p: Miscellaneous

- Calendar
- Optimized Hours
- Coffee and Tea Tool
- Gold Card Information
- Transit Pass





**District 1096 Ops Meeting**  
**October 26<sup>th</sup>, 2009**  
**3p-6p**

3p: Coffee Tasting—Serenity/Nicole

- Passports
- Customer Letters

3:30p: Holiday

- Key Dates
- Targets
- Store Hours of Operations/Closures
- Scheduling-Ghost Schedule

4:30p: Ecosure/Customer Voice

5:00p: Break

5:15p: Labor/VIA

5:30p: Miscellaneous



**District 1096 Ops Meeting  
November 8, 2010  
2p-5p**

2p: Coffee Tasting—Brandon

- Passports
- Customer Letters

2:20p: Mission Statement/AOP

2:30p: World Class Customer Service

3:30p: Earnings Call/Plan, Do, Check, Adjust

- VIA
- Customer Voice
- BR2

4p: Break

4:15p: Miscellaneous:

- Labor-Daily Reporting by 1p
- Cash Over/Short
- Back up Staffing Plan-Pods
- Community Website
- Pillar Spokesperson: E-mail me information to discuss next week





## **District 1096 Ops Meeting**

### **April 26<sup>th</sup>, 2010**

### **3p-6p**

**3p-Coffee Tasting: Eddie**

**3:15p- Frappuccino Happy Hour: Serenity**

- All SMs come prepared with your teams plan for Happy Hour 5/7-5/16, 3p-5p. Think strategically, labor investments, return on investment, party feel in store, who are the right partners to be out in FOH to make it fun?...just a few things to think about.

**3:35p- Center of Excellence: Michael**

- Customer Connection Repeatable Routine: All SMs be prepared with list of partners not performing at 100%, what is your plan to get them there by when? Pay close attention to step 3, that is where I've observed most misses in the stores.
- Coffee Cadence
- Clean, Fast, Friendly, Taste, Merchandising
- May 12 tour with Victor: Jen

**4p- Succession Planning: Jen**

- Staffing: Come with updates of needs
- Update Succession Tool: All SMs come prepared with your development plan for your store: ASM to SM(readiness time frame: 0-3mnths, 3-6, 6-9), SS to ASM(readiness time frame: 0-3mnths, 3-6, 6-9), barista to ss(readiness time frame(0-3, 3-6)
- ASM Development plan in our District
- ASM tools updated on portal
- My Learning: Tools/Support

**5:20p- Break**

**5:30p- Miscellaneous**

- Community-Michael
- Symphony Launch/Anticipated Challenges/Plan
- Preparedness/Updates for Blended Launch
- IMS
- Cash over/short, Deposits processed daily





**District 1096 Ops Meeting**  
**August 27<sup>th</sup>, 2008**  
**10a-6:30p**

10a: Coffee Tasting—Serenity/Customer Letters

10:30a: Sales Building Plans

- Oatmeal/Vanilla & Whey Protein USD Targets
- Driving Peak Transactions—Tracking and Building
- Review P+L—Activity: Top 3 Strengths/Top 3 Opportunities

12p: Lunch

1:30p: Fall Promo—David

2:30p: Break

2:45p: Optimized Hours

4:15p: Break

4:30p: Retail Dashboard—Stefanie

5:30p: Miscellaneous

- Calendar
- Cleanliness
- Customer Voice
- Staffing
- Health Quotient





**District 1096 Ops Meeting**  
**September 24<sup>th</sup>, 2008**  
**10a-6:30p**

10a: Coffee Tasting—David/Customer Letters

10:30a: Optimized Hours

12:00p: Break

12:15p: Succession Planning

2:15p: Lunch

3:00p: Three Bold Moves

4:00p: P and L Analysis/Sales Building Plans

5:00p: Miscellaneous

- Calendar
- Cleanliness—Updated QASA, Bathroom Attendant
- Customer Voice check in
- I-9 Compliance
- Feedback from New Hire Roundtable
- Community Involvement





## **District 1096 Ops Meeting September 20<sup>th</sup>, 2010 2p-5p**

**2p: Coffee Tasting—Serenity/Blake**

- Passports

**2:15p: Partner Planning—Brandon**

- Discuss Bench for Q1/Q2
  - SS to ASM
  - Barista to SS
  - Hiring Needs
- Career Day Candidates

**3:30p: Budgets/VIA Targets**

- Review FY '11 Targets
- Review FY '11 Q1 VIA Targets
  - Review VIA presentation
  - Merchandising of all SKUs
  - How to use POS effectively
  - Creative Strategies/Tactics to ensure targets are achieved
    - Plan/Do/Check/Adjust
    - Who are your store leads(there should be a lead present from open to close daily)
- Ghost Schedules/Labor Investments

**4:30p: Schedules**

- Week of 9/20:
  - Plan for upcoming weeks

- Problem Solve accessibility/functionality of Espresso Bar to support BR2
  - Begin reviewing Symphony information with all partners
- Week of 9/27:
  - ALL BR2 Training scheduled/completed
  - Train/Certify all partners on Fall 2
    - Every partner must taste each of the new VIA flavored coffees
  - 9/29-9/30: Schedule changes for Symphony
- Week of 10/4:
  - Fall 2 Set up
  - VIA partner
  - First week of Q1 ghost schedule with focuses on VIA/am and pm peaks
  - Follow up coaching (check and adjust) to ensure BR2 is happening consistently
- Week of 10/11:
  - Career Day: October 12<sup>th</sup> , 1p-5p
  - District Center of Excellence Tour: 10/12, 5p-9p
  - Continue VIA partner
  - Continue Q1 Ghost Schedules (Check and Adjust Daily based on prior week sales)
  - Monday: send Jen Barista Certification/Skill Check with confirmation complete by all partners
  - Continue coaching (check and adjust) to ensure BR2 is happening consistently

5p: Miscellaneous:

- Reviews-
  - Bring 2 copies of signed ASM review to your review time
  - PDPs
- Cash Over/Short
- Vacation Requests for entire year: due by Monday, 10/4





**District 1096 Ops Meeting  
September 24<sup>th</sup>, 2008  
10a-6:30p**

10a: Coffee Tasting—David/Customer Letters

10:30a: Optimized Hours

12:00p: Break

12:15p: Succession Planning

2:15p: Lunch

3:00p: Three Bold Moves

4:00p: P and L Analysis/Sales Building Plans

5:00p: Miscellaneous

- Calendar
- Cleanliness—Updated QASA, Bathroom Attendant
- Customer Voice check in
- I-9 Compliance
- Feedback from New Hire Roundtable
- Community Involvement